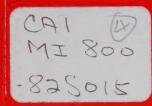


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Employment and Immigration Canada

John Roberts, Minister

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Background Paper 15

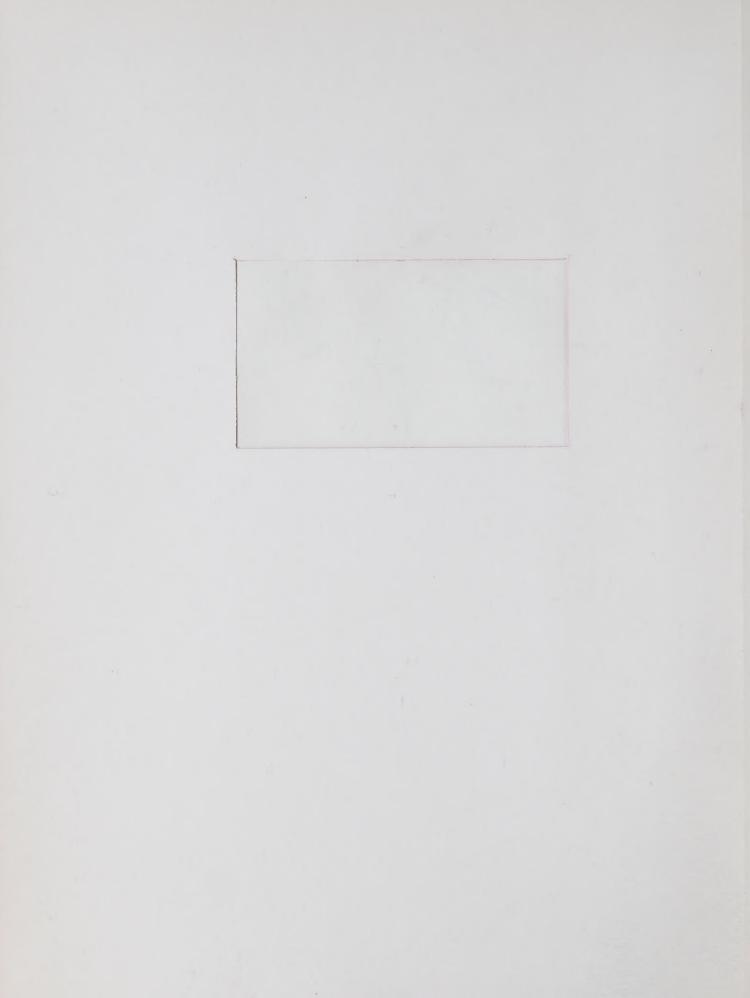
PAID EDUCATIONAL LEAVE

Canadian Association for Adult Education

# Skill Development Leave Task Force

Background Paper

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Background Paper 15

PAID EDUCATIONAL LEAVE

Canadian Association for Adult
Education

April 30, 1983.

This is one in a series of background papers prepared for the Task Force on Skill Development Leave. The opinions expressed are those of the author(s) and do not necessarily reflect the views of the Task Force or the Department of Employment and Immigration.



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## APPRECIATION

CAAE expresses thanks to Dr. Terry Trussler for his research assistance in the literature review for this report.

#### INTRODUCTION

This report is a study of the receptiveness of the Canadian population to a policy of paid educational leave. It has been undertaken in co-operation with the Institut Canadian d'Education des Adultes, Montreal.

One component of the study is a series of consultations undertaken in Vancouver, Edmonton, Saskatoon, Winnipeg, Thunder Bay, Ottawa, Montreal and St. John's during the months of February and March 1983 to obtain input from members of the public and individuals with experience in the field of adult education. Direct input from some of these meetings is contained in the report. CAAE expresses appreciation to the 122 individuals who contributed something in the order of 625 volunteer hours to the success of this effort.

A second element of the study is a structured random sample survey of 2,115 Canadians 18 years of age and over during the second and third weeks of March 1983. This survey was undertaken jointly by CAAE and the Institut Canadien through the co-operation of the Gallup organization.

A third ingredient in this study is a literature search.

A full list of texts, reports and articles consulted is contained in the bibliography.

A fourth component is a series of responses to inquiries from CAAE on the part of various educational leaders in selected European countries. The Association expresses appreciation to each of them for their kindness in sharing their assessments of PEL experience in their own countries and also information of current developments which would not have been otherwise available through the Canadian literature search.

Canada is fortunate to have acquired recently the educational leadership of Prof. Kjell Rubenson, Department of Adult Education, University of British Columbia. Formerly Head of the Department of Educational Research at the Stockholm Institute of Education, Dr. Rubenson has brought to this country a much needed analytical capacity and experience which he has placed at the disposition of the Association. In addition to contributions of advice and support to this undertaking, he has contributed directly to the Task Force an excellent paper on barriers to participation in adult education. His study has contributed to our understanding of this complex subject.

Readers will note that the approach of this study is to examine the climate for paid educational leave in Canada in the following contexts:

 consultation and random sample survey of public perceptions, awareness and attitudes towards paid educational leave in Canada

- compilation and analysis of data on learning behaviour, needs and barriers in Canada
  related to the development of policies to
  support paid educational leave
- selective analysis and interpretation of international experience regarding paid educational leave focussing upon applicability to the Canadian context

This study has been undertaken on a 'crash' basis in line with the requirements of the Task Force. As a result, some additional evidence or interpretation may come to light following the preparation of this report. In this event, CAAE will be pleased to offer a further contribution to the discussion and debate regarding the application of PEL in Canada.

This report should be read in conjunction with a previous publication of the CAAE/ICEA, From the Adult's Point of View, which presents the two associations' analysis of the situation facing adults who wish to participate in adult education in the 1980's.



### LEARNING A LIVING

Marshall McLuhan's description of the future of work is prescriptive for the Canadian labour force of the 1980's. Everywhere there is new evidence of the increasing pace of skill depreciation. A factor that once was considered to apply only to certain elite groups in society is now affecting large components of our work force. Skill obsolescence is the key issue public policy must address in the coming decade. CAAE's public consultations during the past months have reinforced the conviction of the Association that Canadians are increasingly preoccupied with the issue.

Indeed, the survey conducted by CAAE/ICEA revealed that more than four in ten labour force participants who had an opinion thought their jobs would definitely or probably be affected by technological changes in the workplace during the coming five year period.

In such an environment, governments must pause to consider the wisdom of a 'preventive' approach. Instead of placing all of the public effort into programs to re-equip with skills those who are forced out of work by economic downturns or technological change, some portion of the total effort should be directed towards those currently employed whose current skills are depreciating as a result of changes in the workplace. The Canadian public appears to be well

aware of the importance of up-grading skills and maintaining competence in an age of rapid change. When asked on the CAAE/
ICEA survey what advice they would extend to people affected by changes in the workplace to help them adjust, half the respondents suggested 'retraining', followed by 'reduce resistance to change' (one in five responses). Recognition of the importance of learning to combat skill obsolescence is strongly established in public opinion.

In its report In Short Supply, the Economic Council of Canada has mobilized extensive evidence of the enormity of the problems posed by the combination of economic downturn, structural unemployment and technological change. The Council's conclusion is that "it is the co-existence of joblessness and (skill) shortages that renders the current employment conditions so disturbing". (37) The weight of evidence is building to support the contention of those who predict jobless growth in the coming decade. In this circumstance, the current record levels of unemployment are projected to continue throughout the decade and to affect certain groups much more seriously than others.

The confluence of these factors - unacceptable levels of aggregate unemployment and skill obsolescence - suggest to CAAE that government should address the PEL option with very serious attention. For CAAE, a Canadian PEL policy can only be a win-win situation, responding at once to the

priority need to reduce the supply of labour and the need to equip those who offer themselves for work to develop the skills which will enable them to make meaningful contributions.

However, the implications of a substantial initiative to encourage PEL should not be overlooked. They include a strong push upon the existing educational systems of the country to become more responsive to new needs, and equally radical, to change their established modes of behaviour to accommodate learners at times, places and in modes convenient to them. The resistance to this responsiveness should not be under-estimated. In this connection, it is of interest for public policy to note that almost one in three persons who indicated that he/she took a course in the three year period ending March '83 took the course from an organizer other than an employer, union, university, community college or school board according to the results of the CAAE/ICEA survey. This 'other including voluntary association' category was the largest identified by the survev.

A second implication goes beyond the responsiveness question to the whole way our society conceives of and organizes learning opportunities. Our future requires us to break with the current 'lock-step' model of learning, earning, retirement

to an <u>interrupted</u> model for learning. This new approach, known elsewhere as 'recurrent education' or 'lifelong learning' suggests that individuals obtain not just the right to education as members of the community, but also the right to <u>defer</u> their access to education to <u>appropriate</u> intervals throughout their lives. On a long term basis, there must be developed a societal consensus upon this interrupted education approach and a commitment to change the existing structures in response.

In certain European states, the introduction of PEL brought into being a whole new apparatus of educational providers because some of the existing providers, notably universities, were slow to adapt. The need for co-ordination to encourage adaptation by existing institutions is obvious, yet the results will by no means follow without interventions.

Finally, the introduction of a PEL policy in Canada must address the fundamental question of needs and access identified in the accompanying survey data, the literature and other submissions to the Task Force, notably that of Kjell Rubenson. His article published in the current issue of CAAE's journal Learning refers to the conundrum that "demands are negatively related to objective needs for education" with a prescription to address the problem: "To bring about a change it is necessary that future subsidies to adult

education be ear-marked to a much larger extent than has previously been the case".\* The submission of the Canadian Congress on Learning Opportunities for Women speaks strongly to this issue as well. Initial suggestions from CAAE on approaches in public policy to this issue are contained in this report. Conscious decisions are required at the policy level if the issue is to be addressed.

## The Club of Rome has stated that:

It no longer makes sense to cram education into the first eighteen to twenty odd years of life. Nearly everyone who has studied the mal-distribution of schooling over a lifetime agrees that the system should be re-organized and the years of education re-allocated over the period of a normal lifespan... the prevailing systems are generally too rigid to accept lifelong learning as a viable, widely available option.

# And the Economic Council reports:

The old cycle of schooling, training, and work is likely to be replaced by a sequence punctuated by frequent periods of retraining and re-education. In recognition of this, arrangements for lifelong skill development must be investigated carefully.

This is the task before the Task Force.

<sup>\*</sup> Learning. Vol. III. No. 4. page 8.

#### HIGHLIGHTS OF RANDOM SAMPLE SURVEY

During the second and third weeks of March '83 CAAE and the ICEA asked the Gallup organization to administer a random sample survey to identify the educational behaviour, opinions and activities of 2,115 Canadians 18 years of age and over. Details of this survey are contained in the following chapter. Here are some highlights and interpretations:

- British Columbia leads the country in the proportion of its 18 and over population who have returned to pursue their education after their initial interruption of formal schooling.
- Persons age 50 and over are only half as likely as persons under fifty years of age to have returned for additional courses following completion of their initial schooling.
- Males (at 47%) have returned to take courses with greater frequency than females at 39%.
- Persons with only primary formal education are less than half as likely as persons with secondary education to return for additional courses; they are only one quarter as

likely to return as persons with post-secondary educational backgrounds.

- Individuals with family incomes below \$10,000 are only half as likely to return to take additional courses as persons with family incomes over \$40,000. The likelihood rises steadily through the various family income groups.
- Persons in the labour force are almost twice as likely to have returned to take courses as persons not in the labour force.
- Of all people who have returned to take courses, full-time, part-time or occasionally, 45% of them took a course in the year ended March '83 and 68% during the past three year period.
- People who have not taken a course during the preceding three years were asked how likely there were to take a course in the coming year. This likelihood declines rapidly with age but rises by educational attainment and family income. English-speaking respondents were almost twice as likely

as French-speaking respondents to participate in the coming year. People unemployed (but actively seeking work) were twice as likely as the labour force as a whole to return to take a course, and five times as likely to do so as persons who are not in the labour force.

- Seventy-five percent of males who have taken one or more courses in the past three years took a business/occupation related course whereas only 52% of females did so.
- People taking courses during the past three
  years chose business/occupation related courses
  twice as often as either 'non-academic' or
  'academic' courses.
- Eighty-seven percent of persons who took a course during the past three years completed that course.
- Job related reasons for taking courses outweighed other reasons by a factor of 2 to 1.
- Twice as many males as females reported that
  it was their employer who organized or sponsored
  their course.

- Community colleges organized 22% of all courses followed by employers (21%), universities (17%), school boards (12%) and unions (3%). The 'other' category inlouding voluntary associations was the largest at 29% of the total.
- Employers, unions and universities were more likely to organize courses for people with family incomes over \$30,000 whereas community colleges, school boards and 'other including voluntary associations' were more likely to organize courses with participants whose incomes were under \$30,000.
- Among those employed, 30% of full-time workers reported that their employer organized the course whereas only 13% of part-time workers so reported.
- Males are four times as likely as females to have courses operate completely during working hours.
   The same proportion applies to full-time workers compared with part-time workers.
- Persons whose courses required tuition fees over \$100 were asked 'who paid the fee'. Employers paid the fee twice as frequently for male as for female employees. Sixty percent of full-time workers paid the fee themselves, compared to 92% for part-time workers.

- The majority of those who had tuition fees over \$100 and paid the fees themselves who did not claim the fee as a taxable deduction were male.

  The majority also had family incomes over \$30,000.
- Where course-takers identified additional costs
   (in addition to tuition) in excess of \$100
   associated with taking the course, thirteen
   percent of males indicated that their employer
   paid these additional costs but only one percent
   of females.
- English-speaking respondents are significantly more likely than french-speaking respondents to consider that their jobs had been affected by technological change during the past five years.
- When asked to give advice to people whose jobs have been affected by changes in the workplace, half the labour-force participants offered the following type of comments: "Go back to school, retrain, take a course, keep current and broaden training, get education related to the job".
- Seven out of eight persons surveyed indicated that they tended to favour a program to enable

working people to take time off, on a shortterm or part-time basis, to improve skills or
adapt themselves to the changing workplace
while continuing to earn income during the
course and returning to their job upon its
completion.

When asked who should be responsible for encouraging such a program, four out of ten people suggested 'employers' and three out of ten, 'governments'. For french-speaking people and residents of Quebec the proportions reverse.

### SURVEY RESULTS IN DETAIL

During the second and third weeks of March 1983 the CAAE and the ICEA jointly undertook a structured random sample survey of 2,115 Canadians, eighteen years of age and over. This survey took the form of in-home interviews administered by the Gallup organization as a part of their weekly Omnibus Survey. Details on the design of the sample and the characteristics of those interviewed are contained in an appendix to this report together with a photocopy of the interview instrument.

## This survey sought to identify:

- labour force participation
- educational participation following initial schooling
- educational participation during the past three years
- courses taken
- reasons for taking the course
- who organized the course
- whether course was taken during hours of work
- whether participant continued to be paid
   while participating
- where course was taken
- tuition fees
- who paid them

- additional costs incurred
- opinions on skill obsolescence
- opinions on paid educational leave

Limitations imposed by the time available and budget constraints have, in some instances, reduced the available sample for certain questions to a point below the threshold of statistical reliability. As in all random sample surveys, the level of confidence one can place in the resulting information is constrained by the size of the sample. A detailed note on sampling tolerances is appended. Readers of this chapter should exercise caution in their interpretation of the evidence based upon the following tolerances:

Size of sample	Allowance for sampling error
2,000	2% to 3% 19 out of 20 times
1,000	2% to 4% "
600	4% to 5% "
400	4% to 6% "
200	5% to 9% "

Within the above allowances, the larger recommended tolerances for sampling error will occur for percentages near 50, and the smaller for percentages near 10 and 90. Samples of around 100 respondents can be used only with great care. They remain, however, valuable in instances where wide distinctions between reported figures exist. The significance of the caveat "19 out of 20 times" is that the chances are 95 in 100 that the sampling error will not be larger than the figures noted.

In cases where important conclusions may be drawn from small samples, it would be prudent to consider repeating the survey with a larger base sample in order to increase confidence in the accuracy of the results.

A summary of significant results of the survey follows:

# Educational Situation

Respondents were asked to identify which of the following descriptions most closely fitted their situation:

- still in school and have not interrupted
   my schooling
- finished my schooling and have not taken
   any additional courses of any description
- interrupted my schooling but have returned either full-time, part-time or occasionally to take courses

The third of these categories was broken out into additional detail but, for purposes of summarizing the results, these have been grouped. In a previous publication, From the Adult's Point of View, CAAE and the Institut Canadien

d'Education des Adultes have considered the first of these groups not to be adults, according to our operating definition of the term. The second group we have labelled, for simplicity, 'non-learners' and the third group, 'learners'.

According to this methodology, the March '83 sample breaks down as

non-adults 5%
non-learners 54%
learners 41%

When the non-adults are excluded, the proportion of learners is 43% and non-learners, 57%. Readers should note that 'learner' in this case is a simplified code for persons who have returned to take what they consider to be 'courses' at any time in their lives after their first interruption of continuous participation in formal education.

In this sample, the break out of learners/non-learners by demographic and other categories is as follows:

Region	Learners	Non-Learners
Atlantic	47%	53%
Quebec	39	61
Ontario	42	58
Prairies	42	58
British Columbia	56	44
Canada	43	57

Age	Learners	Non-Learners
18-29	50	50
30-49	52	48
50+	28	72
Sex		
Female	39	61
Male	47	53
Educational Attainment		
Public School	18	82
High School	43	57
Post-secondary	70	30
Family Income		
- \$10,000	30	70
\$10,000 - \$19,999	36	64
\$20,000 - \$29,999	44	56
\$30,000 - \$39,999	55	45
\$40,000 +	57	43
Occupation (head of family)		
Professional/executive	52	48
Sales/clerical	57	43
Labour	42	58
Other	31	69

Mother tongue	Learners	Non-Learners
French	41	59
English	46	54
Other	36	64
Community size		
100,000 +	47	53
10,000 - 99,999	44	56
- 10,000	37	63
Employment status		
Work full-time	52 ·	48
Work part-time	. 48	52
Actively seeking work	54	46
Combined labour force	52	48
Not in labour force	30	. 70

The above data are based upon participation in courses at any time after the original interruption of continuous educational participation. In all, 865 persons were identified on the survey as 'learners' and 1,141 as 'non-learners'. Of the 865 'learners', 392 took one or more courses during the past year, and 589 during the past three years. That is to say, of all the adult 'learners', 45% were 'active' during the past year and 68% during the past three years.

# Likelihood of Participation During the Next Year

Age

Those adults who had not taken a course during the past three years were asked whether they thought they might be interested in taking a course, either full-time, part-time or as an occasional student during the coming twelve month period. Of the 1,417 persons in this category, 19% responded positively. Among certain groups, however, this likelihood factor departed from the overall average significantly:

18-29	38%
30-49	23
50 +	6
Educational attainment	
Public	9
High school	21
Post secondary	31
Family income	
- \$30,000	17
\$30,000 +	31 •
Mother tongue	
French	13
English	23
Other	18

## Employment status

Work full-time	20
Work part-time	30
Actively seeking work	49
Combined labour force	27
Not in labour force	10

# Reasons That Might Inhibit Participation

This same group - those adults who have not participated during the last three years - were also asked: "What reasons do you think might come up that would prevent you from taking a course?" Their 'open-ended' responses have been grouped into the following categories:

Too old, senior citizen now, retired	19%*	
No desire, drive, interest	17	
Too busy, no time	.15	
Family situation, need baby- sitter, when kids grow up, new baby etc.	8	
Cost, not enough money	7	
Health reasons	5	
All other reasons	40 111%*	

<sup>\* %</sup> of respondents. In all, the 1417 persons offered 1,577 reasons

Needless to say, almost all those who cited "too old" were themselves over 50 years of age and nine-tenths of those who referred to "family situation" were female. Persons with only public school educational attainment were only half as likely to cite "no time" as other respondents. Similarly, persons with family incomes under \$10,000 were half as likely to so respond while persons with family incomes over \$40,000 were significantly more likely to do so. Low income persons were more than twice as likely to refer to health problems as other income groups. "Family situation" was mentioned significantly more often by persons who are not part of the labour force while "cost" was twice as prevalent a response among part-time and unemployed people than for those employed full-time.

Among the 272 persons who have not taken a course during the past three years and 'might be interested' in taking a course in the coming year, the reasons most frequently cited which might prevent participation were:

No time		25%
Cost		21
Family	situation	11
Health	reasons	9

# Type of Course Taken During the Past Three Years

The 589 adults (29% of the total surveyed) who had taken a course (or more than one) during the past three years were asked to describe the type of course taken. The responses were grouped as follows: business/occupation related, other academic and non-academic.

## The results indicate:

	Female	Male	Total
Business/occupation related	52%	75	64
Other academic	35	22	28
Non-academic	41*	23	32

Although the results should be treated with caution because of the small numbers involved, the following trend is none-theless significant by employment status for participation in business/occupation related courses. As a percent of courses taken by persons in each of the following categories, business/occupation related courses ranked as follows:

Work full-time	68%
Work part-time	47
Actively seeking work	61
Not in labour force	34

<sup>\*</sup> totals exceed 100% because the 589 individuals took 730 courses. % refers to individuals.

## Incidence of Course Completion

When the 589 respondents who indicated that they had taken one or more courses during the past three years were asked, with respect to the most important course taken (if more than one were taken), "Did you complete the course?", the following results came forth:

Completed course	69%
Did not complete course	10
Still taking course	20
Not stated	1

Discounting the last two categories of response, the reported completion rate is therefore 87%. The completion rate for business/occupation related courses is similar to the overall rate of completion.

# Reasons for Taking the Course

The same 589 course-takers during the past three years were asked, for the most important course if more than one were reported, to choose among six categories of reasons, the most important reason for taking the course. Ninety-seven percent of the course-takers chose among the six reasons, three percent offered other reasons of their own or did not state a reason. By order of frequency of choice, the reasons

#### were:

•	To acquire new skills that	
	will help me to keep up with my job	25%
•	for personal enjoyment, including recreation, development of mental, physical, artistic ability or craftsmanship	21
•	to get a job and/or improve my employment prospects	18
•	to obtain a promotion, a better job, and/or to increase my income	15
•	to improve my ability to commun- icate with others and to be more effective in my relationships with family and others	10
•	to increase my capacity to under- stand and participate in work and/ or union affairs	9
	other or not stated	3*

Significant departures in the frequency of response on the above reasons can be reported among certain population groups by age, sex, income and employment status.

<sup>\*</sup> adds to 101% because of rounding

"To acquire new skills that will help me to keep up with my job" was chosen by only 18% of persons aged 18-29 but by 29% and 31% respectively by persons in the 30-49 and 50+ age groups. The "personal enjoyment" reason was chosen by only 15% of persons under 30, 19% by persons 30-49 and 37% by those over 50. "To get a job" was the choice of 29% of 18-29 years, but only 13% of those 30-49 and 2% of those 50+. "To obtain a promotion" was chosen by 20% of those 18-29, 15% by those 30-49 but only 2% by persons over 50 years. The other reasons were reasonably horizontal by age.

Female respondents were less likely (at 20%) to choose "to acquire new skills" than males (at 29%) whereas females chose "personal enjoyment" (at 26%) more frequently than males (at 16%).

Persons with family incomes below \$30,000 chose "to get a job" at a rate of 23% as opposed to those with incomes over \$30,000, at 9%. On the other hand, "to acquire new skills" was the choice of 32% of persons with family incomes above \$30,000, and only 19% for other respondents.

Unemployed people (those actively seeking work) are obviously a small numeric component of this survey but their choices so radically differ from the average response that they bear reporting. Unemployed persons who have taken courses during

the past three years (69, in all) chose among the reasons in the following order:

•	to get a job	38%
•	to obtain a promotion	16
•	for personal enjoyment	14
•	to improve my ability to communicate	12
•	to acquire new skills	8
•	to increase my capacity to understand and participate in work	7*

The first choice (at 38%) was more than twice as popular as any of the others. It is significant to note that the persons reporting that they were actively seeking work during March '83 were not necessarily unemployed when they took the course in question.

The reason offered by persons whose course was business/ occupation oriented reflected the following order:

•	to acquire new skills	34%
•	to get a job	20
•	to obtain a promotion	18
•	to increase my capacity to understand and participate in work	11
•	for personal enjoyment	9
•	to improve my ability to communicate	5*

<sup>\*</sup> does not add to 100% owing to rounding and "other reasons"

When the 589 course-takers were asked to identify all the reasons they took their most important course during the past three years (as opposed to their most important reason), the following changes in the order of reasons became evident:

•	to acquire new skills	42%
•	for personal enjoyment	42
•	to obtain a promotion	34
•	to get a job	27
•	to improve my ability to communicate	21
•	to increase my capacity to understand and participate in work	20
•	other and not stated	6*

# How Many Hours per Week?

The 589 course-takers were asked to identify how many hours per week the course took. When their responses are grouped into less than 15 and more than 15 hours, a significant difference can be noted by sex:

	Female	Male	Total
15 hours or less	72%	59	65
more than 15 hours	28	41	35

These figures discount those who did not state an answer, did not recall, or who reported 'varies/no specific time'.

<sup>\* %</sup> of respondents. On average, each person offered 1.9 reasons

#### Duration of Course

The course-takers were also asked to indicate the duration in weeks of their most important course taken during the past three years. Significant variations from the average response were identified based upon age, sex, and mother tongue when the responses were grouped into less than and more than 15 weeks:

	Total	Age 18-29	30-49	<u>50+</u> *	Female	Male
- 15 weeks	57%	46	60	79	53	61
15 weeks +	43	54	49	21	47	39
		tongu Eng			ŀ	
- 15 weeks	47		59	66		
15 weeks +	53		41	34		

In other breakouts, the samples reflect closely the average response.

# Who Organized the Course?

The course-takers were asked to identify the organizer, or sponsor of the most important course they took over the past three years. The responses were grouped as follows: employer, union, university, community college/cegep, school board and other, including voluntary associations.

<sup>\*</sup> caution should be exercised in these columns owing to the small sample size

	Total	Female	Male
Employer	21%	13	28
Union	3	1	5
University	17	15	18
Community College/ CEGEP	22	24	21
School Board	12	16	8 .
Other including Voluntary Association	29*	34	. 24
	Age	30-49	<u>50+</u>
Employer	14%	23	32
Union	4	2	3
University	17	20	6
Community College/ CEGEP	29	19	16
School Board	15	. 9	10
Other including Voluntary Association	24*	29	39
	Income. Under \$	30,000	Over \$30,000
Employer	1	L9 %	25
Union		2	4
University	1	L4	22
Community College/CEGEP	2	26	18
School Board	1	L3	10
Other including Voluntary Association	3	30*	27

<sup>\*</sup> totals may not add to 100% owing to rounding and occasional double responses. Total responses = 103% of sample.

Among those employed full-time, 30% reported that their employer organized the course, whereas among those who worked part-time, only 13% identified the employer as the organizer of the course.

When the data on 'course hours per week' and 'duration of course' are cross-tabulated with the organizer/sponsor responses, the following breakout results:

	Hrs./Week % under 15	Duration/Weeks % under 15
Employer	45	74
Union*	93	75
University	67	39
Community College/ CEGEP	64 .	50
School Board	88	54
Other including Voluntary Association	65	54

# When Course Took Place

Those members of the labour force who have taken one or more courses during the past three years (467) were asked whether the course took place

- completely during your working hours
- partially during your working hours

<sup>\*</sup> throughout this series, the figures for unions should be treated with caution because of the small sample size

# not at all during your working hours

#### The results are

Completely during working hours	21%
Partially during working hours	10
Not at all during working hours	69

Because of the sample size, little meaning can be attached to the mid group, those who responded "partially during working hours". Significant variations do occur between groups when 'completely' and 'not at all' categories are cross-tabulated:

		30-49		Female	Male
Completely	13%	25	37	. 8	30
Not at all	77*	66	50	81	61
	Income -\$30K				All others
Completely	16%	24		24	17
Not at all	78*	63	63		72
					Actively seeking work
Completely	4	27%		8	11
Not at all	•	53*		81	84

<sup>\*</sup> totals do not add to 100% owing to absence of 'partially' category

	Hrs./Week % under 15	Duration/Weeks % under 15
Completely	34	74
Not at all	75	51
	Type of course. Business/occup.	related Others
Completely	24%	15
Not at all	66	76

# Incidence of Being Paid While Taking Course

Those members of the labour force who reported taking a course partially or completely during working hours were asked whether they continued to be paid while taking the course. The number of respondents was 144. Significant variations from the average were observed between age groups and income groups:

	Total		30-49			
Paid	78%	64	84	81	68	82
Not paid	22	36	16	19	32	18

Because of the sample size, this information can be taken only as suggestive of a trend.

By cross-tabulating the preceding two series (working hours and whether paid) it is possible to assemble five categories of response from among the 467 labour force participants

who have taken a course (or more than one course) during the past three years. The results, in totals, are as follows:

Completely in working hours	
paid	84
unpaid	15
Partially during working hours	
paid	27
unpaid	17
Not in working hours	322*

Even with the threshold of statistical reliability problem, it is possible to obtain a general trend line by comparing the two largest groups reported above, those who took courses completely during working hours and were paid while doing so, and those who did not take courses during working hours. Several breakouts are of interest:

Course type	Paid/Working Hours	Not
Business/occup. related	71%	60
Other courses	29	40
Incidence of completion**		
Completed	96%	84
Not completed	4	16

<sup>\*</sup> adds to 465. Two persons failed to respond.

<sup>\*\*</sup> excludes persons whose courses are still underway

Course hours/week	Paid/Working Hours	Not
Less than 15	29%	75
More than 15	71	25
Duration of course (wks.)		
14 weeks or less	76	52
15 weeks or more	24	48
Course sponsor/organizer		
Employer	72	8
Union	1	3
University	8	20
Community College/CEGEP	3	28
School Board	2	14
Other including Voluntary Association	16	29
Most important reason for taking course		
acquire new skills that we help me to keep up with my	4 ×	23
increase my capacity to un stand and participate in a and/or union affairs		9
get a job and/or improve a employment prospects	my 13	18
improve my ability to commicate with others and be more effective in my relationships with family and others.	tion-	11

	Paid/Working Hours	Not
obtain a promotion, a better job, and/or to increase my income	8	18
personal enjoyment, including recreation, devel opment of mental, physicartistic ability or cramanship	L- ical, 2	20
other reasons	4	2*

#### Where Course Took Place

Those persons who took a course completely or partially during working hours (144 in all) were asked whether they took the course at their place of work, or elsewhere.

Place of Work	28%
Elsewhere	70
Not Stated	1*

Those who took the course completely during working hours and who continued to be paid while taking the course reported a 35% 'place of work'. Those who reported that the organizer of the course was their employer took the course at their place of work 41% of the time.

# Tuition Fees

All persons who took a course during the past three years were asked whether there was a tuition fee and, if so,

<sup>\*</sup> totals do not add to 100% owing to rounding

whether that fee was less than, or more than, \$100. The results, and breakouts with significant variation from the average result, are reported below:

	None	<u>-\$100</u>	\$100+	Not stated
All course-takers	25%	37	36	1*
Educational attainmen	ıt			
Public School	27	65	8	0
High School	28	41	30	1
Post Secondary	19	27	53	2
Mother Tongue				
French	30	41	28	1
English	23	36	40	1
Organizer/Sponsor				
Employer	62	15	23	1
Union	38	47	15	0
University	7	20	71	2
Community College/ CEGEP	7	53	40	0
School Board	30	62	9	0
Other including Voluntary Assn.	20	41	35	2
Course Location				
Place of Work	75	4	21	0
Elsewhere	44	14	42	1

# Who Paid Tuition Fee

Respondents whose tuition fee was \$100 or more were asked who paid the fee. The following results report the breakdown of the total response and several sub-groups where significant

<sup>\*</sup> horizontal totals may not add owing to rounding

variations occur. The total size of this group is 212.

	Total	Female	Male
Myself	66%	74	61
Employer	24	16	30
Government	8	6	9
Union	2	2	2
Other	3	6	1
Not stated	1	1	0

	Employment Work F/T		Actively Seeking	
Myself	60%	92	69	69
Employer	37	0	3	12
Government	3	10	17	15
Union	2	4	0	0
Other	1	0	7	9
Not stated	0*	0	4	0

# Tuition Fee as Taxable Deduction

The <u>Income Tax Act</u> provides a deduction for tuition fees in excess of \$25 for a course. Recent proposed amendments will, if adopted, increase this threshold to \$100. Respondents who paid a tuition fee of \$100 or more were asked whether they, in fact, claimed the deduction when they computed their income tax obligations. The results indicate:

<sup>\*</sup> totals may not add to 100% owing to rounding and occasional plural responses

Clai	imed	tuition	deduction	719
Did	not	claim		24
Did	not	state		5

The above series relates only to those persons who paid the tuition fee themselves. The majority of those who did not claim had family incomes in excess of \$30,000 and almost half of them were males. Persons taking business/occupation related courses were more likely (at 84%) to claim than those taking other courses.

#### Additional Course Costs

The course-takers were asked if they had incurred other costs to take the course, such as transportation, babysitting, books, materials, etc. Their overall response, and significant variations are reported below:

	Total	<u>Female</u>	Male
No additional costs	29%	22	35
Less than \$100	40	52	30
More than \$100	29	23	34
Not stated	1*	2	- 1

<sup>\*</sup> totals may not add to 100% owing to rounding

	Family -\$30K	income \$30K+
No additional costs	22%	37
Less than \$100	46	37
More than \$100	31	25
Not stated	2*	0

	Employment Work F/T		Actively Seeking	Not
No additional costs	34%	27	21	24
Less than \$100	39	48	36	44
More than \$100	28	26	40	29
Not stated	0*	0	3	4

# Who Paid Additional Costs?

Those in the above series whose additional costs were \$100 or more (171 persons) were asked who paid the additional costs. Their response:

	Total	Female	Male
Myself	87%	94	83
Employer	9	1	13
Government	4	3	4
Union	0	0	0
Other	2*	3	1

<sup>\*</sup> totals may not add to 100% owing to rounding

#### Skill Obsolescence

Persons in the labour force who have taken courses during the past three years, and on a subsequent survey (the Gallup National Omnibus for the fourth week of March '83) all labour force participants, were asked:

With the advent of computer technology, labour saving machines and other changes in the work-place, many people have found their jobs changing or becoming obsolete.

Considering your experience at work during the past five years, to what extent is (was) your job already affected by these changes? Would you say your job is (was) affected...

to a great extent...
to a slight extent...
not at all...
don't know.

The response for the entire labour force was:

To a great extent	14%
To a slight extent	25
Not at all	59
Don't know/not stated	2

For labour force participants who have taken courses during the past three years and sub-groups with significant variations from the average, the data are as follows:

To	tal	<u>Female</u>	Male		tongue English	
To a great ext.	24%	21	26	17	27	27
To a slight ext.	29	26	32	28	30	30
Not at all	44	51	40	51	42	38
Don't know/ Not stated	2*	2	3	4	1	6

The next question was:

Do you think there is a good chance that your job will be affected by this in the next five years? Do you think it...

definitely will be affected... probably will be affected... probably will not be affected... definitely will not be affected... don't know.

For the whole labour force, the response was:

Definitely will be affected	18%
Probably will be affected	22
Probably will not be affected	20
Definitely will not be affected	36
Don't know/not stated	4

For the course-takers who are members of the labour force, the response data follow:

<sup>\*</sup> totals may not add to 100% owing to rounding

Definitely will be affected	318
Probably will be affected	21
Probably will not be affected	20
Definitely will not be affected	23
Don't know/not stated	5

No substantial variations exist between sub-groups in respect to this judgment.

The next question posed was:

Still considering the changes occurring in the workplace, would you say that the people you are working with are concerned about what's going on? On the whole, do you think they are...

very concerned...
slightly concerned...
not at all concerned...
don't know.

#### The responses:

	Whole L/F	Course takers in L/F
Very concerned	32% ·	32%
Slightly concerned	32	36
Not at all concerned	30	27
Don't know/not stated	5*	5

No substantial variations in the concern level are to be found among sub-groups.

<sup>\*</sup> totals may not add to 100% owing to rounding

The final question in this 'skill obsolescence' series posed an open-ended question:

If you had to give advice to people whose jobs had been affected by changes in the workplace, what specific advice would you give to help them cope with or adjust to these changes?

	Whole L/F	Course-takers in L/F
Go back to school/retrain take a new course, learn		
new skill, keep current broaden training, get ed tion related to the job	and 47%	53
Be flexible/adapt: reduce resistance to change, le to work with it		20
Get involved in computer field: widen knowledge of computer, take some kind computer course	of 11	-14
Other advice	8	5
Don't know/not stated	22*	17

The above categories have been clustered from the various open-ended responses recorded.

<sup>\*</sup> totals exceed 100% because some individuals gave more than one piece of advice.

# Opinions Regarding Paid Educational Leave

The final series of questions on this survey were posed to each of the 2,115 individuals polled:

Some people in Canada think programs should be available to enable working people to take time off, on a short-term or part-time basis, to improve skills or adapt themselves to the changing workplace. They would still continue to earn income during courses and they would return to their job upon completion.

If this practice were established in Canada, would you tend to be in favour of it or not?

Yes, favour...
No, do not...
Don't know...

The response was:

Yes, favour 81%

No, do not 12

Don't know/not stated 7

Discounting the last category of reply, the response was:

Yes, favour 87%

No, do not 13

For sub-groupings of the overall sample the response, excluding the 'don't know/not stated' category, was as follows:

	Favour	Do not favour
Canada	87%	13
Atlantic	92	8
Quebec	87	13
Ontario	85	15
Prairies	90	10
British Columbia	86	14
Age		
18-29	93	7
30-49	87	13
50+	82	18
Sex		
Female	88	12
Male	87	13
Educational attainment		
Public School	79	21
High School	89	11
Post-Secondary	88	12
Family income		
- \$10,000	85	15
\$10,000 - \$19,999	87	13
\$20,000 - \$29,999	88	12
\$30,000 - \$39,999	89	11
\$40,000 +	85	15

	Favour	Do not favour
Occupational groups		
Professional/Executive	85	15
Sales/Clerical	89	11
Labour	90	10
Other	85	15
Mother tongue		
French	87	13
English	89	11
Other	80	20
Community size		
100,000 +	87	13
10,000 - 99,999	89	11
- 10,000	87	13
Employment status		
Work full-time	87	13
Work part-time	90	10
Actively seeking work	93	. 7
Not in labour force	85 ,	15
Current educational status		
Active learners (3 yrs.)	88	12
Non-active learners (X 3 yrs.)	88	12
Non-learners	86	14
Students (no interruption)	97	3

The survey concluded by asking those who indicated that they favoured the above proposal for a system of paid educational leave (1,710 persons):

Which of the following should be most responsible for encouraging such a program?

the workers...
the unions...
the employers...
the governments...
the learning/educational institutions...
don't know.

Responses suggest significant variations from the average for the following sub-groups: region, age, educational attainment, family income, and mother tongue:

	Total	Age 18-29	30-49	50 +
Workers	12%	9	13	15
Unions	5	5	5	5
Employers	40	42	41	37
Governments	31	35	29	28
Learning/Educat- ional Institutions	9	9	9	9
Don't Know/Not Stated	8*	14	9	9

Discounting those who were uncertain, or expressed no opinion, the totals are: workers 12%, unions 5%, employers 42%, governments 32% and learning/educational institutions 9% of the sample (1,654).

<sup>\* %</sup> of respondents. Exceeds 100% because some respondents expressed more than one view. Total responses = 1,791.

	Canada	Atl.	Que .	Ont.	Prair.	B.C.
Workers	12%	13	10	13	11	12
Unions	5	5	5	5	3	5
Employers	40	41	31	44	44	44
Governments	31	31	41	25	26	32
Learning/Educ Institutions	e. 9	10	8	9	11	8
Don't Know/ Not Stated	8*	6	8	9	8	8

	Family -\$10K		\$20-30K	\$30-40K	\$40K+
Workers	12%	11	11	11	14
Unions	3	5	6	3	6
Employers	. 32	38	42	44	45
Governments	36	33	35	31	25
Learning/Educ. Institutions	10	7	8	8	9
Don't Know/ Not Stated	11*	9	4	8	9

	Educ.	Attai: High	nment Post.	Mother Fren.	Tongu Eng.	other
Workers	12%	11	15	10	13	10
Unions	4	5	3	5	4	6
Employers	33	40	48	30	45	39
Governments	33	31	27	42	26	36
Learning/Educ. Institutions	12	9	8	9	9	12
Don't Know/Not Stated	10 *	8	7	8	8	8

<sup>\*</sup> See footnote, preceding page

# Duration of Current Employment

Those respondents who indicated that they were currently employed either full-time or part-time were asked to identify how long they had been working at their current job. In all, 1,087 individuals fell into this group.

They responded as follows:

	Full-time	Part-time
Less than one year	7%	21
One to five years	36	47
Six to ten years	21	17
Over ten years	35	14
Don't know/not stated	1	1

#### INTERNATIONAL EXPERIENCE WITH PAID EDUCATIONAL LEAVE

In co-operation with the ICEA, CAAE has undertaken an overview survey of international experience with paid educational leave (PEL). The material in the following summary is not designed to duplicate the report being prepared by the Institut, but rather, to offer a series of comments about the <u>current</u> status of PEL in a number of European countries, drawn from a literature search and from correspondence with educational leaders and CAAE's counterpart organizations in the countries concerned. CAAE intends to undertake follow-up inquiries during the coming months with each of those European leaders who responded and the Association would be pleased to include questions from readers of this report in those follow-up consultations.

#### Denmark

In order to obtain an overview comment upon the Danish experience vis-a-vis the introduction of PEL, CAAE contacted the Director of Dansk Folkeoplysnings Samrad, our counterpart organization in Copenhagen. His response is contained on the following page. Please note that Denmark has resisted the introduction of PEL over fifteen years while its immediate neighbours have experimented widely with the concept.

Dansk

Folkeoplysnings • Longangstræde 37 • 1468 Kobenhavn K. • Telefon (01) 15 14 66 Samråd

dfs

11th March 1983 PEK/iaa

Ian Morrison
Executive director
Canadian Association for Adult Education
29 Prince Arthur Avenue
Toronto M5R 1B2
CANADA

MAR 25 1983

Dear Ian,

Paid educational leave is a topic of much controversy in this country, but so far we have no general provision for paid educational leave.

Since the adaption of the convention in ILO the labour unions have recommended - and in later years demanded - the ratification of the convention. Last year we thought they - and we - would succeed. The labour government had finally announced that a bill would be proposed in the autumn of 1982, but all plans were cancelled when the cabinet resigned during the summer to let the conservative-liberal opposition take over. The present minister of education, a liberal, is a declared opponent to any "compulsory" adult school. It is, however, my firm belief that even a conservative-liberal government eventually will accept and even recommend provisions for paid educational leave.

The labour unions and the ministry of education have prepared papers and documentation (some might be of interest to you), obviously because the debate in our countries to a large extent will focus on the same problems. Language is a problem - but it might be possible to get translation of some of the material.

As far as paid educational leave is concerned, Sweden and Finland and the Federal Republic would - as I am sure you are aware of - be interested to include in your survey.

Poul E. Kandrop

# Federal Republic of Germany

CAAE's German counterpart is the Deutscher Volkshochschul-Verband E.V. In response to our request for information, the Verbandsdirektor, Helmuth Dolff drafted the following letter. He also enclosed three reports on the state of PEL in the Republic. One of these is a summary he prepared in 1980 for the American Educational Testing Service. This summary is also contained in the report immediately following his letter.

Note that Dolff's remarks are necessarily generic because of the five individual policies in each of the Länder which have adopted PEL laws. There is, of course, no federal PEL law or policy in Germany at present.

In their 1980 article, Luttringer and Pasquier report that in the Federal Republic PEL "as regulated by a number of Länder or certain collective agreements is intended primarily to promote civic education and knowledge of social and economic affairs". (414). Kjell Rubenson, in his report to the Task Force states, regarding Germany:

One of the reasons why paid educational leave has not lived up to its potential or to the hopes of its proponents stems from the gap between educational and training offerings and the needs and expectations of adults, particularly adults with little or no more than compulsory schooling. (29)

# DEUTSCHER VOLKSHOCHSCHUL-VERBAND E.V.

**VERBANDSDIREKTOR** 

page 58

Deutscher Volkshochschul-Verband e.V. - Rheinallee 1 - 5300 Bonn 2

Mr.

Ian Morrison
Canadian Association for Adult
Education
Corbett House - 29 Prince Arthur Avenue
Toronto M5R 1B2

Rheinallee 1 5300 Bonn 2 Tel. (0228) 35 50 63

Az.: 600 - Do/F1

February 22, 1983

Canada

#### Dear Ian:

Today I received your letter from February 8, 1983 with your request for material about paid-educational-leave in the Federal Republic. The question is simple and complicated at the same time. Since ten years we have in some of our federal states laws on paid educational leave and in addition to that a lot of different pilot-studies and experiments on the same matter.

There is meanwhile such a lot of literature on that point that I feel a little helpless what to select for you. Beyond it all the material (books and broschures or text's of legislation) is in German and at the moment I don't know about a summary or short description in English (except one written by myself I would like to attach).

There is another short summary "Experiences with PEL-Legislation "from our loose-leaf-let-handbook (see encl.)

Thirdly you'll find enclosed a pocket-book which we published in 1980:
"Problemfeld Bildungsurlaub" (Page 205 - 232 Bibliographie on PEL).
And last not least it is enclosed an special-issue of "berichte und informationen der erwachsenenbildung in niedersachsen", Title: Paid Educational Leave in Lower Saxony-Experiences, Problems and Perspectives". (Lower Saxony is our State with the most experience in PEL)

If you like to get more material we have to send you a container, but feel free to ask specialized questions which I can forward to our liberary in Frankfurt.

Because of the present economic situation in the FRG no initiative will be taken in the near future for PEL on the federal level. The development in different states are regressive also because of the economic situation and mass-unemployment.

This in brief some remarks and material. Best regards.

Cordially,

Encl.

materials sent by separate mail (air mail)

Extract from text prepared by Helmuth Dolff on PEL in Germany for the Educational Testing Service, Princeton, New Jersey in 1980:

It is still too early to report on substantial experiences with pinational leave as the laws in five of the Lander of the Federal Republic of Permitty are still relatively new and also quite different. Some general retarks on the general situation can be made, however.

Since the sixties educational leave has been publicly discussed in the first Republic of Germany. The term has generally been accepted. Misunderstandings connected with this designation very rarely arise now. Strictly smalling, it should be understood as follows, however: "Paid leave of the from other work for the purpose of continuing education". This chation was also used by the Educational Council in its so called "smallure plan" of 1970. According to the future conception of the stional Council and in its overall concept, educational leave is an import of the system of continuing education

Edwarfonal leave is therefore not only claimed by the trade unions in Foderal Republic of Germany. It is equally considered to be necessary to the educational research point of view. One can, from the emancipating will as from the economic aspect, advocate educational leave. Accordingly, are recommendations for educational leave from UNESCO, the "General core on International Labour Organization" and from the "Council of the for the Overall Economic Development in the Federal Republic of Security."

The problem of financing is unsolved in the public discussion and with respect to the implementation of existing laws. The originally envisaged solution, namely that costs for the period in which no services are rendered by the absentee had to be borne by a compensatory fund of the employers, that the programme costs were to be taken over by public funds and that the participants' fees were also not to exceed normal cost of living, could not be realized due to the economic situation which involves both private industry and the authorities.

Taking all these various aspects into consideration one has to say, in a strongly simplified way, the following: The laws concerning educational leave which were enacted these last years in the Lander of Bremen, Hamburg, Hesse, West Berlin and Lower Saxony have not received the spontaneous approval of the consumers, as had been expected at the beginning of the discussion on educational leave.

Due to the situation on the labour market there is the risk that only those employees take advantage of their right to educational leave who are already qualified and who do not care if they eventually lose their jobs as a result of participation.

The question of distributed financing of educational leave could not be solved due to the economic situation. Therefore decisive elements of stimulus and orientation are missing that would fully integrate educational leave into the overall system of continuing education.

As at the moment much more emphasis has to be placed on short-term job security and job provision, it is particularly difficult to convince the employees of the long-term chances and advantages of educational leave and to motivate them for participation.

The laws on educational leave in the Lander mentioned above were enacted without sufficient experience with a methodologically and didactically new form of continuing education. It is only now, with programme models being initiated in a larger context, that experiences with them can be used to create better conditions for future regulations.

Due to the lack of appropriate elements in the various laws it is extraordinarily difficult to gain an insight into how many employees really make use of the legal possibilities. It seems certain, however, that only a relatively small percentage of employees are able to and do make use of the opportunities.

The institutions of continuing education are by no means in the position, not even in those Lander in which laws on educational leave exist, to provide the necessary local facilities, personnel and course content to fulfill the legal claims of the vast number of employees. It will take a long time until the need can be fully satisfied.

There is continuing discussion of whether educational leave as a whole could best be regulated within the framework of an overall reform of the educational system and thus also of continuing education.

# England and Wales

As educational policy is devolved to the various components of the United Kingdom, CAAE contacted England and Wales separately from Scotland for the purpose of the current inquiry. The England and Wales contacts are with the National Institute of Adult Education (England and Wales) and with the Advisory Council for Adult and Continuing Education to the Department of Education and Science, Westminster.

The responses from Arthur Stock, Director of the NIAE and from John Tayler, Secretary to the Advisory Council follow. Arthur Stock has included with his letter, in addition to the books which are referenced in the bibliography to this report, two newspaper articles, one featuring comments of a leading Social Democratic Party politician.

# National Institute of Adult Education page 62 (England and Wales)

19B De Montfort Street Leicester LE1 7GE

Telephone: (0533) 551451

Director

A K Stock BSC MED ADE

Your ref.

Our ref. AKS/HGMCC



23rd February 1983

Mr. I. Morrison,
Executive Director,
Canadian Association for Adult Education,
Corbett House,
29 Prince Arthur Avenue,
Toronto,

M5R 1B2

MAR 1 1983

Dear Ian,

CANADA.

#### PAID EDUCATIONAL LEAVE

I was interested to learn from your 8th February letter about the intention of the Canadian government to encourage and further paid educational leave. I was glad also to learn that the federal administration had had the good sense to consult CAAE before formulating policy.

The situation in UK is that PEL is only mentioned specifically in two pieces of national legislation (see page 12 of enclosed book "Education and Work"). Other legislative initiatives have encouraged or implied the development of PEL (i.e. labour market/training legislation); but the major sources of PEL are either employers' initiatives or products of collective bargaining where trades unions have negotiated for PEL on behalf of their members.

In fact PEL is not now considered to be the primrose path to recurrent or lifelong education, as was perhaps implied by the ILO Convention (140) of 1974. The enforced 'leave' of large-scale unemployment, the in-built discrimination against women's participation and the fears for job security by the presently employed all militate against full-scale deployment even in countries with a universal PEL law, such as France. Indeed in that country there have been substantial addenda tacked on to the original law of 1971 enabling some of the levy money to be used for social-educational purposes relating to a variety of unwaged groups.

However, as job-shating (now grant-aided by the UK Manpower Services Commission) grows and the pressure for other forms of paid-work distribution increases the paid educational leave policy is not likely to die the death. I enclose two cuttings from a recent WEA NEWS which bear on this matter. There is a corporate member organisation of NIAE, namely the Association for Recurrent Education, who regard PEL as a major policy objective for achieving their aims.

So ... as you will see from the enclosed\* books there is a substantial amount of PEL in UK, very little of it the direct product of legislation and

\*now being sent separately by printed paper airmail post

with a distribution which favours the young rather than the old, males rather than females and executive grades rather than manual workers. The only industries with a reasonably larger commitment to PEL training and education for <a href="manual">manual</a> grades of worker are engineering and electronics.

I hope this helps. Possibly I could contribute more in a short visit to Canada. What I mean is that I may be able to visit Toronto for ICAE and other purposes sometime later this year, and I could possibly assist any later analysis or discussions. However this is probably the best I can do for your 15th March dateline set by the Canadian government.

Let me know if further comment or materials would be useful.

Best wishes,

Sincerely,

Arthur Stock

Director

P.S. Please keep the "Education and Work" and "Continuing Education" books; but please return the "PEL in France, West Germany and Sweden" and the ILO book as they are our only library copies.

# Trade Union Tony Corfield recalls Role Education

I have been asked to recall the introduction of trade union role education into the WEA. At the time it stirred up a lively controversy. Those of us directly involved were given a distinctly unwelcome reception. We seemed to have come in at the wrong end of the coconut shy!

In 1953, after some years experimenting on a small scale, the TGWU, using WEA tutors, introduced a major programme of courses focusing specifically on the actual functions of the Union's lav activists - shop stewards, branch secretaries and branch chairmen. The syllabus was not just narrowly functional: students were encouraged to look at principles as well as policies. But what marked them off from the older-type liberal studies courses was that they were designed to be directly relevant to the trade unionists' day-to-day responsibilities and problems as lay officials.

#### **Dutch Auction**

The pioneers of these trade union courses in Britain found themselves running up against the defenders of the established order in adult education. The foundations for this had been laid in 1908 by R H Tawney when he started his three year university tutorial classes at Rochdale and Longton. In 1950 the three year university tutorial class remained the hallmark of excellence in liberal adult education. Every tutor employed in WEA classes was expected to groom his students towards them.

This policy was already showing signs of wear and tear. Professor Raybould, the Director of Leeds University Extra-mural Department and a Deputy President of the WEA, had already publicly blamed the WEA for failing in its duty to recruit sufficient working men and women into tutorial classes. As a signal of his dissatisfaction he loosened the previously intimate bonds between the WEA Districts and his Extra-mural Department. Relying upon his own organisational resources, he then set about recruiting workers directly into Leeds University adult classes.

Sidney Raybould hit out at the new trade union courses. He accused Ellen McCullough, at that time the TGWU's education officer, and myself of disparaging the three-year tutorial class and suggested that role education of the kind we were sponsoring in the TGWU might distract support from the traditional forms and standards of adult education. He later made a further point that my fulltime appointment by the TGWU as director of studies could constitute a threat to independent workers' education in the country. Staff in my position would be the captive of their employers' policies.

The unkindest cut came from Harold Clay, who in his Presidential address to a WEA conference, expressed his objection to educational methods which he described as being more suited to a Dutch auction than to a WEA classroom. When challenged by Vic Allen, the Director of the first full TGWU branch officers' school in 1953, in a letter to the Guardian, Harold Clay denied that he was

referring to the TGWU trade union courses. But he did not make clear what he was referring to. The imputation of philistinism tended to stick.

# National Programme

Thirty years later the controversy appears very dated. Trade union role education has become generally accepted. The TGWU trade union schools continue on broadly similar lines. The system we used involving professional tutors in the public educational sector, common syllabuses, activity methods, background teaching notes for tutors, and printed hand-outs for students has been employed on a more ambitious scale. Pre-eminently the TUC has applied the methods for its national programme of shop stewards' day release courses.

I felt privileged as Director of the WEA's Service Centre for Social Studies to have played some part in helping to forge the close working relations between the WEA and the TUC's Education Department in these developments. The training notes produced for the TUC about the Conservative Government's Industrial Relations Bill in 1971 may have helped establish a pattern of teaching documents combining fact and instructional method which the TUC subsequently pursued to very considerable effect.

Perhaps its greatest success in this field has been its programmes for health and safety at work. No less than 80,000 safety representatives have been taken through ten day release courses throughout the country. In these WEA and other professional tutors in the public educational sector from universities, polys and further education colleges have used TUC syllabuses and training guides to enable safety representatives to fulfil the role given to them under the Safety Representatives and Safety Committees Regulations of 1978. These courses have received the acclaim of the trade union movement, the CBI and the Chairman of the Health and Safety Commission. They are a resounding testimony to the vitality and relevance of role education and co-ordinated syllabuses. No less they attest the willingness of the WEA, whose tutors have played such a significant part in its success, to adapt to new needs. Sadly, by contrast, the three-year tutorial class, over wide areas of the country, has gone into the limbo of history. But that is another story.

Looking back more than thirty years after what appeared to us a daring experiment, it is now clear that we were ushering the age of the shop steward into adult education. It has not, surely, been one of the least worthy or least effective causes the WEA has espoused.



# Shirley Williams MP

The WEA is passing through a very tough time at present, and many of the bright hopes in the Russell Report now seem further away from attainment than ever. I recollect the excitement with which we discussed the expansion of trade union education in 1977 when I was at the Department of Education and Science and the beneficial efforts of extending the grant system to the adult education residential colleges. The climate since then has become harsher, and some of the planned developments have been stillborn.

Yet the role of adult education matters more than ever. In a fast-changing society, knowledge rapidly becomes obsolete. No-one can rely now on what he or she learned at school and college to get through a working life, whether in a skilled trade, a craft or a profession. In a society with more time for out-of-work activities, whether sport, the arts, or voluntary help, education for the constructive use of leisure is of growing importance—and that includes courses for those retiring, whether early or at

the statutory age. In a political society that emphasises participation, by parents in running the schools, by patients in health care, by inner city neighbourhoods in their own rehabilitation, by workers in industrial and management decisions, adult education is indispensable. Without it, participation will be limited to an articulate, confident minority.

I have become more and more convinced that our education system needs to be opened up, to people of every age and occupation. Community schools have shown that adults and children can study side by side to their mutual benefit.

#### Paid Educational Leave

American community colleges have proved that people of all ages want access to education, full-time or part-time, at various points in their lives. I have advocated for a long time a credit transfer system, so that men and women can gradually build up the credits needed for formal qualifications even if their education is spasmodic



or broken off. I believe there is a strong case for paid educational leave, based on a period of leave for a given number of years of work. I think the trade unions should include educational leave and inservice training among their bargaining aims.

But more important than anything else is that men and women should have access to education. formal and informal, vocational and general, throughout their lives. I would like to see many more summer courses conducted by the WEA together with the Universities and Polytechnics, I would like to see the WEA involved in educating employers and employees alike to make industrial democracy work. The WEA has a great past. It needs little imagination to see how major its future contribution can be, given understanding and the necessary financial support.

Shirley Williams MP

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MAR 2 2 1983

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18 March 1983

Des Jan

Many thanks for your letter of 4 March, which arrived today, so I haven't much chance of getting a reply to you by 15 March as you hoped. However, we have not pushed the idea of paid educational leave for three reasons:

- (i) By definition it would only apply to the (admittedly large) minority of adults who have employers (ie: about 20 million adults out of 45 million), and hence could be seen as divisive. We have gone instead for the idea of a general adult entitlement to education, which might start with selected groups of people and gradually extend over time to the whole population.
- (ii) Insofar as we have advocated PEL we have been careful to drop the word 'paid'. This is because we don't see much real prospect of getting employers to give more paid leave, in the present economic situation, but they might just take to the idea of unpaid educational leave which also retains employees' pension and seniority rights.
- (iii) All the research here shows that PEL is currently concentrated on male employees in early and mid career and mostly in skilled manual and managerial jobs. Hence again it can be very divisive.

I hope this helps, even if only in a negative way. It occurs to me that you may not have a copy of the PEL research project which the NIAE published a little while ago, so I am sending a copy to you by separate airmail post.

F J TAYLOR

Secretary to the Council

## Holland

In some ways the Dutch experience is the most interesting of any European country for Canadian attention at this point because Holland has not, as yet, moved to introduce any substantive policy on PEL. However, as in Canada, the Dutch government has appointed, in concert with the national labour and business organizations, a Tripartite Committee on Paid Educational Leave. The Chairman of this Committee, Louis Emmerij, Rector of the Institute of Social Studies at the Hague has prepared a quite remarkable, sweeping paper on the subject of the position of PEL in the Dutch society and economy. This paper has been the subject of international discussion through the efforts of the Organization for Economic Co-operation and Development, whose Centre for Educational Research and Innovation has published, on a 'restricted' basis, the document in the English language. It is shortly to be published formally in the United States. In view of the importance of this document for the Canadian situation, CAAE will include it in its entirity as an appendix to this report. The paper is to be found on page 133.

Particularly in view of the assumption by some our our colleagues in England and the Federal Republic that PEL's application may be blunted by the current economic downturn, the argument of Prof. Emmerij presents a radical challenge. His paper places PEL among a battery of economic policy instruments that western governments must consider precisely

because of the sustained economic crisis and the employment crisis.

If too few jobs can be created, something different must be done to influence the people who present themselves on the labour market from the present method, namely, by throwing them out of employment. (1)

Emmerij lists, among the alternative mechanisms, six for examination:

- early retirement
- extension of compulsory education
- longer holidays
- shorter working weeks
- fewer working hours per day
- flexible mix or work, recurrent education
   and leisure time

The latter is his prescription for a PEL policy for Holland. His arguments for this sixth alternative parallel some of the policy objectives of this Association, namely,

The essence of our proposal is to transform this rigid, sequential system into a more flexible recurrent system, in which it will be possible to combine or alternate periods of education, work and retirement throughout a person's adult life. (6)

The arguments advanced for this approach include:

increased labour market flexibility for

employers and workers alike owing to the increased pace of retraining in line with technological change and easier individual re-orientation in mid-career.

- increased capacity for individuals to realize potential because educational participation can be timed at periods of positive motivation.
- PEL can be used as a counter-cyclical economic weapon.
- labour supply can be reduced in aggregate, thereby contributing to better balance of supply and demand for work.

The economic/structural limits for once will be consistent with the socio-cultural objectives of the individual. Instead of a diminishing majority which works harder and harder, and an increasing minority which is expelled shamefully from the labour market, we are proposing that available work be rationed more intelligently and more comprehensively than has been suggested so far. (8)

In his paper, Emmerij calls for a system of recurrent education open to receive people of all ages, integrated education and training, variable and flexible duration and plural exit points.

The advantages of the system advocated include:

- better linkage between changing skills required and educational and training supply
- a cyclical capacity whereby government
   can steer fewer or more people into PEL
   according to the strength of the economy
- reduce the perverse effects of post-secondary
  allocation, or income distribution currently
  in place in western countries provided,
  as a matter of policy, positive discrimination
  is built in to favour those with greater needs
- creation of an improved climate for work

People who withdraw voluntarily from the labour force are in a very different psychological situation (than) those who are forcefully expelled. (12)

He concludes with an examination of the implications of this suggestion for social security spending in general and a harmonization of PEL policy with the social security system, away from spending for 'negative' reasons to spending for 'positive' reasons. He calls for an expansion of the definition of PEL from that of ILO 140 to include "not only workers, but also other categories who will be given first priority to benefit from such leave".

The debate between those who favour expansion of the public sector through means imposed by the government on the one hand, and those who want to give opportunities and insights to individuals on the other, will become one of the principal controversies of the 1980's, cutting straight across existing political parties. (19)

In our view these issues are of first rank importance to the debate in Canada and deserve careful consideration in the policy development process. Their most fundamental implication for Canadian policy development lies in the requirement to consider PEL in the context of unemployment insurance, and general social and educational spending. This will require not only federal inter-departmental initiatives, but also inter-governmental co-operation for its full application within this country.

CAAE proposes to develop contacts with Prof. Emmerij and will welcome follow-up in co-operation with other interested Canadians to explore the points of potential common interest between Canada and the Netherlands in this regard.

## Scotland

CAAE's inquiry for current evidence from Scotland yielded two useful summary documents from Vernon Smith, Director of

the Scottish Institute of Adult Education. One is a comprehensive survey authored by Ian Bryant and Colin Titmus of the University of Glasgow (see bibliography), a summary of which is contained on the following pages, and the second is an article "Paid Educational Leave in Scotland" by Ian Bryant, based upon the same survey and published in the Scottish Journal of Adult Education. This is also reproduced on the following pages. The overwhelming impression created by these documents is that the concept is under-developed in Scotland and is perceived there as no more than an instrument for employer-sponsored occupational training. Phrases like 'the PEL needs of employers' permeate the literature. Readers should note that the article concludes:

The overwhelming domination of short-term, job-related PEL is likely to continue, given employers' attitudes and a lack of collective pressure to institute PEL as a right without qualification of content (i.e. as instituted in several Western European countries).

## SUMMARY OF SCOTTISH EXPERIENCE WITH PAID EDUCATIONAL LEAVE

Since the provision of PEL is in the hands of employers who implement their policies according to the individual circumstances of companies, public service departments, etc., it is possible to draw conclusions from the interviews that are valid only if general terms. particularistic practices that emerged from the questionnaire survey were confirmed in the more detailed and wider-ranging interviews of the case studies. Except for the relatively small amounts of 'statutory' PEL for health and safety and trade union education, release was governed by the identififation of training needs which varied from case to case. Employers, managers, training staff and other administrators saw one of their functions as being the initiating of PEL once these needs had been They may or may not have taken the views of potential recipients into account before a PEL decision was reached, but in any case in the overall PEL process it was employers who took the initial decisions and did not merely wait upon workers' requests. From the employers' viewpoint, the process and practice of giving PEL to employees may be summarized as follows:

- 1. PEL was identified under the rubric of 'training' and justified in such terms. Training was considered to be important to all those who were interviewed, though it was only the larger employers that had a systematic policy towards it.
- 2. Specific conditions were more likely to be attached to the provision of PEL for shop floor workers than for managerial and other professional personnel. The latter were more likely to have a PEL 'entitlement' and/or to be more liberally treated with respect to 'discretionary' PEL.
- 3. No respondents were sympathetic to the general and unqualified provision of non-vocational PEL, with the partial and notable exception that some were prepared to offer financial support to Open University students.
- 4. Several employers considered that some workers were reluctant, for various reasons, to take advantage of PEL when offered. We believe this to be a genuine observation and not simply an excuse for the relative lack of PEL provision in certain areas.
- 5. PEL 'possibilities' in the form of all the potentially available college courses were usually vetted by employers prior to formal notification to workers. Extensive and indiscriminate publicity was discouraged. Informal communication of PEL information acted as much as a control as more formal processes.
- 6. Pressure from workers for PEL was generally restricted to requests for the training of Health and safety and trade union representatives. Most employers responded sympathetically to these requests.
- 7. Most employers expressed satisfaction with institutions providing the educational content of PEL; many had close personal contacts and an effective input into course syllabi.

- 8. One specific source of dissatisfaction with public educational institutions was expressed as their inability or unwillingness to respond to some of the specific needs of small numbers of employees for training. Also, their scheduling priorities and those of employers occasionally conflicted.
- 9. Employers answering to Industrial Training Boards appreciated their particular attentions and generally described relations as 'good'.

  Most were happy to work with the levy/exemption system, though they considered that some other employers in their industry might not be.

  Group training ass ciations were particularly useful for smaller firms.
- 10. Monitoring the performance of PEL recipients was left largely to providing institutions during the leave period itself. Employer evaluation of PEL as such was informal if not casual, and sometimes non-existent.
- 11. Once granted, PEL was rarely revoked or curtailed except in circumstances of pressing production needs, in which case it was 'key' personnel who were most likely to be denied or asked to postpone leave.
- 12. When choice was possible, employers preferred local, short-term courses for PEL to more extended and distant leave. They were not necessarily unwilling to contemplate such leave (which was generally more expensive) but were more careful in their judgments of who should receive it.
- 13. Employers accepted PEL costs related to training as justifiable expenditure, but at a time of rising costs and static or falling revenues they indicated that PEL would be subject to tighter conditions with respect to length, venue and content. Employers suggested that an alternative system of financing was not really appropriate, but at best supplementary to costs that were properly incurred by themselves.



With Compliments

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## Sweden

From Sweden CAAE has received input from our counterpart organization, Folkbildningsförbundet, whose Director, Ralph Uddman forwarded a resies of English language documents:

- The current PEL statute (1975)
- its draft form as a governmental proposal (1974)
- a summary of the governmental proposals (1974)
- State Study Assistance in Sweden (Ministry of Education and Cultural Affairs) 1978
- A Survey of National Benefits for Students (1979)
- A sample individual application form for study assistance (1982)

Readers may with to bear in mind the following correspondence from Rektor Peter Hammarberg of the folk university regarding the Act on the Right to Educational Leave:

It is important to realize that the right to educational leave does not mean that the employer has to pay a salary. They can do, but usually the employer has to apply for state grants. (11 March 1983)

All of this material is contained as an appendix to this report. Luttinger and Pasquier summarize their understanging of the current Swedish situation as follows:

In Sweden the goals assigned to paid education leave vary with its length. There are in fact two types. Short educational leave - a few hours per day or a number of days at once - is mainly for socio-economical purposes. It focuses on general education and, beyond that, on creating an awareness of the usefulness of training. Longer educational leave - lasting several months or years - provides the beneficiaries with a real opportunity for resuming their studies. (414)

## Other States

The Association has assembled quantitative information on participation in some of the above countries and also information on other European states such as Belgium, Franch and Italy. Readers are invited to inquire about this information if interested or to consult the report of the ICEA. Two useful articles may also prove helpful, both of them contained in the International Labour Review:

- Paid Educational Leave in Five European

  Countries (Luttringer and Pasquier, 1980)
- Paid Educational Leave in Australia, Canada

  Ireland and the United Kingdom, (O'Mally, 1982)

Both of these articles are referenced in the bibliography to this report.

## Summary and Interpretation

Luttringer and Pasquier, quoted above, offer the best overall summary of the European situation, basued upon their study of five states. They first identify three common features of the various national programs they studied:

Despite the variety of the national situations it is possible to distinguish some features which are common to all the objects assigned to paid educational leave. In the countries studied (France, Belgium, Italy, the Federal Republic of Germany, and Sweden) the development of such leave has three goals:

- to improve the workers' conditions of life;
- to give people a "second chance" educationally and socially;
- to promote a long-term social strategy.

Following their review, Luttringer and Pasquier move towards an overview summary in the following fashion:

Paid educational leave remains a marginal institution in the vast field of adult education. Compared with the number of workers trained by and in undertakings (on the job), of jobseekers attending retraining courses and of workers enrolled in evening classes, the annual number of workers taking paid educational leave is small:

30,000 in Italy, 20,000 in Belgium and 21,000 in France. In Sweden, paid educational leave corresponded to 12,800 trainee-years in 1978-79; in Belgium the special fund is even left with a surplus.

...it is no longer certain that the courses should be organized primarily by the undertakings and to further their own interests. Adjusting vocational training to employment entails not only training jobseekers but also paving the way for the retraining of individuals or whole groups, facilitating individual mobility, and preparing employees to live and survive in conditions of economic crisis.

Paid educational leave can be the guarantee given to each employee that he is free to undertake a course of training quite separate from those available in the employing undertaking, without prejudice to his advancement or job security.

If it is to play its part effectively, paid educational leave should be given a more solid institutional basis. The successes and difficulties of the countries studied contain the following lessons:

- (a) the coexistence of two types of paid educational leave appears to facilitate its use, as can be seen from the Swedish example. Short leave encourages the recourse to training: easy to use, it makes people aware of the value of long training with an eye to recycling and advancement;
- (b) if the right to paid educational leave is to become a social reality, it is essential that it be supported by an adequate financing system of its own; otherwise, the lack of specific funding sources will inevit-

ably hold back its development. The establishment of independently administered funds - joint or tripartite - able to finance both the costs of training and the remuneration of trainees appears to be an essential component for the widespread recourse to paid educational leave. (422/423)

From the Association's point of view, several issues permeate the experience of European states with PEL which Canadian public policy would be well advised to consider. While in this country we face differing problems, contexts and public opinions, it would be folly to ignore the implications of external experience as we move into serious consideration of educational leave.

First, the means of financing PEL will always, ultimately be public funds. Those states in Europe which require employers to fund all or part of the course and wage costs are, in effect, taxing the employers with a special levy. The funds are being appropriated for public purposes and this is, quite simply, taxation. As there are limits to the ability of enterprises to bear taxation and maintain their essential profitability, no one should labour under the misconception that enterprises can bear the cost of implementing PEL from their internal resources out of the context of their overall tax position. In any case, in the Canadian political system, such decisions are closely guarded prerogatives of Ministers of Finance. We should face the fact that the funding of any PEL system will be

a public allocation decision. And there are several advantages to this approach in that it is possible thereby to ensure that public policy goals regarding such matters as priority for candidates for leave, quotas and other matters will remain in the public domain.

Second, European experience suggests that statutory interventions are critical to the success of any PEL venture.

Even in countries such as Sweden where 90% of the working population are organized, there remains a strong regulatory and policy role for government. In the Canadian context, where fewer than three in ten working people bargain collectively, leaving the initiative for PEL to collective bargaining would disenfranchise two-thirds of the labour force, among them, many of those persons most in need of PEL.

Third, owing to structural differences between Canadian economic life and that of western European states, it is necessary to identify that those enterprises which have embarked most successfully on PEL in the European context are much less prevalent in Canada. That is to say, compared with the European labour market, Canada is a nation of small enterprises. We will need to adapt European approaches to the very different context we experience in this country, the more so because of the imbalance in the average size of enterprises in the various provinces of Canada. Adaptation of PEL to the small enterprise will be a key ingredient of

any successful Canadian approach.

Fourth, the question of 'who initiates' the PEL experience appears from the European practice to be the key question facing a PEL policy. Based upon our review and analysis of the European experience, CAAE holds the firm view that the choice, the determination of when, what course and the pattern of participation should lie with the individual. Evidence from the random sample survey suggests that individuals will choose wisely left to their own resources. The question of motivation, of appropriate timing should be devolved to the person most effectively equipped to take that decision. The role of employers and of governments is to provide effective information, a form of counselling or encouragement.

Fifth, the ability of persons to obtain short-term and part-time access to educational opportunities is, from the European experience and also from our own analysis of future trends, the most important single component of a PEL plan. The Swedish experience with short-term courses suggests, further, that they can have an effective motivational role for persons who would not move into more serious, long term investments in learning. Administrative convenience should not be allowed to inhibit the best interest of the learner. Part-time learning is the wave of the future and PEL must be designed to respect this trend.

Sixth, European experience suggests that, unless a special and concentrated effort is made, it is the people who already have the greatest benefit from public investment in education who will place the largest demands upon the educational systems. The evidence from the random sample survey confirms irrefutably that this trend operates in educational participation in Canada. A Canadian public policy to promote PEL must address the question of priority groups. Prof. Emmerij has raised this issue squarely in his paper. Prof. Rubenson's discussion paper for the Task Force speaks to this when he notes that "results from welfare surveys and research on participation in adult education bluntly reveal that demands are negatively related to objective needs (for) education". (26) "Put very simply", states Rubenson, "there is a vicious circle: poor childhood conditions, short formal education, low educational standard in adult life, reduced opportunities for participating in political life, no influence through participation, no improvement of educational standard". He refers to "two problems that are very seldom solved. The first is to stimulate the demands among the groups for which the measure is taken. The second is to under-stimulate the demands from groups that are not direct objects for a measure". (27) The Task Force must face this issue.

Seventh, the place of PEL as a labour market instrument must be addressed. There is some promise that the Dutch government will face this question but the evidence from major European countries, including the statements included in this chapter from CAAE's counterparts in England and Germany suggest that the capacity of an educational leave policy to address the problem of unemployment is not even being considered, at least in public opinion and public policy. One of the major contributions of the Task Force, in our view, will be to raise PEL options in this light. Herein lies an opportunity to offer to members of the work-force an occasion, in the words of Emmerij, to voluntarily withdraw their labour for periods of educational activity. This should be seen as a constructive alternative to forced withdrawal through unemployment. The more so as a result of widespread public recognition of the impact of skill obsolescence and our inability to respond to it through heavy front-end loaded investments in the education of young people. Properly advanced and planned, PEL is a win-win situation!



WINNERS AND LOSERS: NEEDS AND BARRIERS

In 1976, the Organization for Economic Co-operation and Development's publication Developments in Educational

Leave of Absence suggested that "demand will grow only with recognition that further education will change things in ordinary life". (44) In the view of Ian O'Mally, in his 1982 study for the International Labour Review, declaring PEL a right will not lead to participation by all types of workers. "Their readiness to do so may depend, among other things, on whether the leave is viewed as being more or less attractive than work and on whether courses are available and beneficial in the eyes of the individual". (182) Accordingly, it is important to examine the questions of motivation and participation, of learning needs and barriers to participation.

The reasons offered for participation by those who were course-takers on the recent CAAE/ICEA poll suggest that occupation-related needs are the most significant. The survey also identified that most people have plural reasons for taking courses, and that occupational advancement may co-exist with avocational motivations. Kjell Rubenson notes that "a clear connection between the situation in which persons find themselves and their engagement in adult education" exists. (9)

Additional input to CAAE came from discussions during the series of consultation sessions throughout the country.

As an illustration of the range of comments generated during these consultations, we include statements generated from the sessions held in Vancouver, Edmonton and Saskatoon, the latter from the viewpoint of older Canadians.

## Barriers

During the February and March consultations, CAAE reviewed with participants the evidence presented in the 1982 publication, From the Adult's Point of View on this subject. Readers are referred to pages 10 through 16. This presentation withstood the scrutiny of the consultation process. Supplementary to the evidence from From the Adult's Point of View, Prof. Rubenson's excellent work for the Task Force presents new information and an improvement upon previous categorizations on this subject.

In his study, he classifies "recruitment impediments" into three categories of barrier: situational, dispositional and institutional. (10) Among the situational barriers, he reviews cost and time, child care and lack of transportation, in particular. He suggests that research is less developed regarding dispositional barriers including motivation and fear of formal education. This latter barrier, he notes, is concentrated in people from lower socio-economic groups. (Overcoming this fear is one of the key issues to be addressed in an educational leave policy. Note the importance of the Swedish experience with short-term leave in this regard.)

Institutional barriers, following Rubenson, occur most frequently in universities and colleges and are experienced by adults who are following courses originally designed for full-time learners. (15) He groups institutional barriers into five categories: scheduling problems, location and transport, lack of interesting, practical and relevant courses, procedural problems (red tape), and poor information on procedures and programs. He quotes Patricia Cross as stating: "Public policy decisions may encourage further removal of institutional barriers, but the major challenge for policy makers lies in better understanding dispositional barriers". (16)

The open-ended responses obtained by CAAE/ICEA in the March '83 survey from persons who had not taken a course during the past three years to the question: "What reasons do you think might come up that would prevent you from taking a course?" cluster as follows:

•	too old, senior citizen, retired	19%
•	no desire, drive, interest	17
•	too busy, no time	15
• •	family situation	8
•	cost, not enough money	7
•	health reasons	5
•	all other reasons	40*

<sup>\* %</sup> of respondents. In all, 1417 persons offered 1,577 reasons.

This data appears consistent with the evidence reported by Rubenson and the material gathered during the preparation of From the Adult's Point of View.

From the point of view of the Task Force, we suggest that the major issue arising from the evidence on barriers and needs is how to increase the opportunity for participation of social groups who have the least previous educational investment from public funds. Alan Charnley, in his 1975 landmark study, <a href="Paid Educational Leave">Paid Educational Leave</a>, drew attention to this challenge as follows:

The principal issue is that for many of the population the monotony of work conditions saps energy, the fees charged for attending courses bear hard on household budgets where marginal payments may become onorous, and thus to those who have least is given less. (17)

OECD, in <u>Developments in Educational Leave of Absence</u>, put it this way: "Those people for whom school was a failure will have difficulty believing that training is anything more than a return to school". (45) The hint of a possible response lies in the Luttringer and Pasquier study for ILO: "For many workers, especially those who have had an adverse experience of schooling, the idea of undergoing training seems out of the question. For such people the best type of information available (about PEL) is the training itself... Paid educational leave of short term duration offers

everyone an opportunity of familiarizing himself with adult education without any definite commitment. It only lasts a few hours or days and makes it possible for workers to attend brief courses on a variety of subjects".

(418) This references the Swedish situation.

And OECD suggested another approach, highly applicable to the Canadian experience in the same publication quoted above: "Lack of motivation, especially for general education, that has been observed in countries where the individual right to educational leave exists, could be remedied if instructors were to be recruited from the same social environment as the people they train". (83)

#### ISSUES FOR CONSIDERATION

In this, the concluding chapter of the report, CAAE wishes to raise for the consideration of the Task Force a series of issues that arise from the foregoing presentation and also from the consultation process throughout the country during February and March 1983.

## Left to Choose, People Choose Wisely

(A policy to promote the granting of paid educational leave) shall be designed to contribute, on differing terms as necessary:

- (a) to the acquisition, improvement and adaptation of occupational and functional skills, and the promotion of employment and job security in conditions of scientific and technological development and economic and structural change;
- (b) to the competent and active participation of workers and their representatives in the life of the undertaking and of the community;
- (c) to the human, social and cultural advancement of workers; and
- (d) generally, to the promotion of appropriate continuing education and training, helping workers to adjust to contemporary requirements.

(Article 3, Paid Educational Leave Convention, International Labour Conference, 1974)

In the development of public policy on PEL, the Canadian government should ensure that the initiative for choosing

the subject studied rests with the individual who will take the leave. The principle of free choice in training is of vital importance. "As employees are bound to their employer by an employment contract", state Luttringer and Pasquier, "and are therefore subordinate to him by law, it is important to preserve the principle of free choice in training". (416) For evidence on how people will choose, given the right to do so, consult the data on types of courses taken in the CAAE/ICEA survey of March '83.

We call upon the Task Force to ensure that a recommendation for freedom of choice in course selection be made an essential component of a Canadian policy. This recommendation is of particular importance in conjunction with the second issue we now turn to: occupational demand information and counselling - in other words - life planning.

## The Missing Link

Persistently throughout the consultation effort across

Canada, CAAE heard from individuals who assert that there
is a missing link in the network of resources open to
persons who want to plan their educational and occupational
futures. There is widespread support for the contention of
the Economic Council that, "in the absence of accurate and
detailed projections" on occupational demand, individuals
will likely behave in a reactive fashion to market conditions.

The Council believes that "the government can improve the present situation by providing the general public with regular, comprehensive projected information on occupational demand. This can be accomplished only by improving the Canadian occupational data base, by intensive and continuous efforts at improving occupational-demand modelling and projection techniques, and by efficient means of disseminating this information". (21) (Our emphasis)

The concept which CAAE has been urged to advocate, and now does so with vigour, is that of a volunteer operated life planning centre, which can link up individuals with accurate information and counselling so as to enable them to choose wisely the educational and other components of their future. This concept combines the urgency of good occupational information with the accessibility and 'trust' which can be engendered by a volunteer-controlled storefront operation. A good example of the type of facility needed is that of the Women's Resources Centre, operated by the University of British Columbia on Robson Street, under the shadow of the Hotel Vancouver. Through its doors annually pass some 11,000 lower-mainland women for counselling and referral. Its counsellors are recruited from among former clients, and all, save the co-ordinator, are volunteers. Its operating budget including downtown retail rent is in the range of \$30,000 per annum. This model needs widespread

consideration as a means of bridging the information/
counselling gap. Its promise lies in its economy, its
capacity to link people with resources, and its 'trust'
factor. Widespread adoption of 'life planning centres'
would enable Canada Employment Centres to concentrate
upon those areas they can adequately handle. The life
planning centre concept is the ideal means to attain the
Economic Council's objective of efficient dissemination
of information. With the on-set of PEL, the need for
effective counselling/planning at the individual level
will become a key element of effective educational choice.
With the on-set of the Canadian Occupational Projections
System, the promise of more useful information also lies
around the corner. Life Planning Centres can put these
together.

Members of the Task Force are asked to note that this concept is consistent with the quotation advanced by the Canadian Congress on Learning Opportunities for Women (CCLOW) in its submission (page 20) from the Organization for Economic Co-operation and Development:

The importance of educational leave resides in the fact that it is both a component of the employment and training policies pursued by governments and employers and (also) a stage on the road enabling the individual to exercise greater freedom in organizing his own life.

This concept is also key to a recent recommendation of the Surrey School District (#36) and Kwantlen College funded by the British Columbia Ministry of Education:

The development of systems at the community level to satisfy the emerging needs and interests of adult learners represents a third alternative. Efforts aimed at developing ways to identify, clarify, inform and support the learning decisions of adult life, whether they be connected with further education or career modification are part of this alternative approach.

(The Third Alternative) links existing initiatives for co-ordination, providers of programs and services, and potential learners. It makes provision for the extension and enhancement of learning facilitation services to increase access for potential learners to opportunities. The establishment of a council - a voice for adult education and an advocate for adult learners is recommended. (vi.)

## Public Objectives: Public Funds

Towards the conclusion of its report, <u>In Short Supply</u>, the Economic Council put the case for public involvement in occupational training as follows:

While stressing the importance of a greater role for the private sector, the Council believes none-theless that governments must retain a central role in vocational training. Much of the comprehensive and transferable skill development, so crucial to

long-term labour market well-being, is unlikely to be identified and carried out by the private sector alone. (98)

(Emphasis added)

This argument can be marshalled to support a lead role for government in PEL policy as well. The low degree of organization in the Canadian labour market, the preponderance of small enterprises and the need to secure leverage to defend the choice of the citizen-learner all mandate a public role. Further, as argued above, any levy-grant system amounts to a form of added taxation and is thereby a form of transferred public expenditure.

CAAE favours a government lead role in this policy initiative and favours the leverage of public funds to attain the public objects. CAAE detects support for this position from the various social partners who have contributed to our consultation process.

## Non-institutional Resources

Readers of this report will have noted that the CAAE/ICEA survey of March '83 revealed that fully 29% of persons who had taken a course during the three-year period immediately preceding the survey indicated that the organizer or sponsor of their course was neither an employer, a union, a university, a college nor a school board. The largest single category of course provider was "other

including voluntary association". It is of great importance, therefore, that the development of PEL policy not confer directly or through provincial governments a monopoly to the three publicly funded course providers. Within reason, it will be important to follow the principle of allowing citizen-learners to determine the organization best equipped to offer a course. In the past this huge category has been all but ignored in occupational training policy. CAAE calls on the Task Force to amend this neglect. Additional work could well be done to identify and focus more clearly this most important adult education resource.

Ian O'Mally, in his 1982 article in the <u>International</u>
Labour Review, referred to this subject when he noted:

The contention that paid educational leave is an educational responsibility ignores both the education and training that take place outside the formal education sector and the fact that such leave is inextricably bound up with industrial relationships and with manpower planning. (182)

## Interrupted Education

CAAE sees the trend of the future as the interrupted education model. Our view is that the initial introduction of PEL should focus upon part-time and short-term applications. With limitations upon the available funds the emphasis should go to this, rather than to support long-

term leaves on a full-time basis.

As noted above, the evidence from Sweden suggests that it is precisely the short-term, part-time leave opport-unities which are most successful at engaging portions of the population most in objective need of the leave experience. Through participation they build confidence in their learning capacity and reduce their fear of an educational experience.

On a short-term, part-time basis, the evidence from the CAAE/ICEA survey suggests that seven in eight Canadian adults support the introduction of a study leave plan. Readers will note that this support cuts across all demographic segments of the sample, ranging from a low of 80% to a high of 97%. Because of the size of the sample and the confidence of the two organizations in the high professionalism of the Gallup organization, it is likely that the sampling error is not in excess of 2%. Statistically this level of confidence can be placed in such results 95% of the time. With such high support, the Association recommends that emphasis be placed in the introductory stages upon the 'short-term, part-time' nature of the PEL policy.

## PEL and Balancing Supply and Demand for Labour

Readers will recall the summary of argument developed in the Dutch context for a national PEL policy on the grounds of containment of unemployment. CAAE urges the Task Force to present PEL for consideration very much as an option for balancing supply and demand for labour. The Organization for Economic Co-operation and Development presaged this argument in their 1976 publication Developments in Educational Leave of Absence when they wrote: "In adult education... there is a common thread linking issues that relate, strictly speaking, to educational leave or to redeployment.... A change in perspective could be contemplated in which periods of unemployment would be transformed into educational leave periods 'due to loss of employment' ". (86/87)

What we ask the Task Force to consider is the progression to the concept, put forth by Prof. Emmerij, of "voluntary withdrawal from the labour force" for educational leave.

Instead of spending the billions of guilders involved for <u>negative</u> reasons, i.e. expelling people from their working environment or forcing young people to remain at school while the majority would prefer to do something else before eventually returning to the educational system, we propose that this same amount of money should be used for <u>positive</u> reasons.

Our approach creates a new form of income maintenance for periods of inactivity. The difference is that involuntary inactivity for some (normally the weaker groups of society) is replaced by periods of voluntary non-working for all. (17)

(Author's emphasis)

To CAAE these are compelling and persuasive arguments and we call upon the Task Force to consider advancing them within the channels of government. The stakes are high because the alternatives will be costly.

With the onslaught of skill obsolescence in the 1980's, the people of Canada have everything to gain!

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APPENDICES

#### APPENDIX A.

On the pages which follow, information on the CAAE/ICEA random sample survey conducted by the Gallup organization is reproduced in the following order:

a.	sample characteristics	126	
b.	design of sample	127	
c.	sampling tolerances	128	
d.	survey instrument	129 f:	f.

SAMPLE CHARACTERISTIC	S page	120	NUMBER	PERCENT
NATIONAL			2115	100
Region: Atlantic Quebec Ontario Prairies British Columbia			212 562 753 345 243	10 27 36 16
Community Size:  Over 100,000 10,000 - 100,000 Under 10,000			1084 324 707	51 15 33
Sex: Male Female			1034 1081	49 51
Age: 18 to 29 years 30 to 49 years 50 years and over Did not state			652 746 687 30	31 35 32 1
Education: Elementary Secondary University Refused		· .	350 1393 367 5	17 66 17 *
Income: Under \$10,000 \$10,000 - \$19,999 \$20,000 - \$29,999 \$30,000 - \$39,999 \$40,000 and over Refused			259 348 381 263 317 547	12 16 18 12 15 26
Occupation:  Prof./Executive Sales/Clerical Labour Other Refused			542 216 714 571 72	26 10 34 27 3
Mother Tongue: English French Other			1294 555 266	61 26 13

Note: Percentages may not add exactly to 100 due to rounding.

<sup>\*</sup> Less than 0.5 percentage points.

#### DESIGN OF THE SAMPLE

The Gallup Omnibus maintains a modified probability sample in all centres over 1,000 in population. A quota sample is used in rural farm and rural non-farm centres. An independent sample of individuals is selected for each survey.

The sampling procedure is designed to produce an approximation of the adult civilian population, 18 years and older, living in Canada, except for those persons in institution such as prisons or hospitals, or those residing in Labrador, the Yukon or the Northwest Territories. Survey data can be applied to this population for the purpose of projecting percentages into numbers of people.

The sample design incorporates stratification by six community size groups, based on the 1976 Census data: Cities of 500,000 population and over, those between 100,000 and 500,000, 30,000 to 100,000, 10,000 to 30,000, 1,000 to 10,000 and rural farm and rural non-farm areas.

The population is arrayed in geographic order by community size and within those classifications, by census enumeration areas. Enumeration areas, on the average, contain about 500 to 1000 people.

A total of 210 enumeration areas were selected randomly from this array. Within urban centres, a random block sampling procedure is used to select starting points for interviewers. The interviewer is provided with a map of the enumeration area, showing the location of the starting point and is required to follow a specified route in the selection of households. Within the household, the youngest male, 18 years and over, at home at the time of the interview is questioned. If there is no male available, or when the male quota is completed, the youngest available female, 18 years and over is interviewed.

The selection of rural farm and rural non-farm interviewing locations follows the sample design established for urban centres in terms of geographic dispersion and random selection of enumeration areas. Because of the low population density and wide dispersion of households, the random block sampling procedure is replaced by quota sampling based on sex and age.

The design of the Gallup Poll sample has been based on population statistics of the Census of Canada, 1976.

#### SAMPLING TOLERANCES

In interpreting survey results, it should be borne in mind that all sample surveys are subject to sampling error, that is, the extent to which the results may differ from what would be obtained if the whole population surveyed had been interviewed. The size of such sampling errors depends largely on the number of interviews.

The following table may be used in estimating the sampling error of any percentage in this report. The computed allowances have taken into account the effect of the sample design upon sampling error. They may be interpreted as indicating the range (plus or minus the figure shown) within which the results of repeated samplings in the same time period could be expected to vary 95% of the time, assuming the same sampling procedure, the same interviewers, and the same questionnaire.

The table below shows how much allowance should be made for the sampling error of a percentage:

## RECOMMENDED ALLOWANCE FOR SAMPLING ERROR OF A PERCENTAGE

In Percentage Points
(At 95 in 100 Confidence Level)\*

			Sample Size				
			2000	1000	600	<u>400</u>	200
Percentages	near	10	2	2	4	4	5
Percentages	near	20	2	3	4	5	7
Percentages	near	30	3	4	5	6	8
Percentages	near	40	3	4	5	6	9
Percentages	near	50	3	4	5	6	9
Percentages	near	60	3	4	5	6	9
Percentages	near	70	3	4	5	6	8
Percentages	near	80	2	3	4	5	7
Percentages	near	90	2	2	4	4	5

The table would be used in the following manner: Let us say a reported percentage is 33 for a group which include 1000 respondents. Then we go to row "percentages near 30" in the table and go across to the column headed "1000". The number at this point is 4, which means that the 33% obtained in the sample is subject to a sampling error of plus or minus 4 points. Another way of saying it is that very probably (95 chances out of 100) the true figure would be somewhere between 29 and 37, with the most likely figure the 33 obtained.

\*The chances are 95 in 100 that the sampling error is not larger than the figures

### GALLUP WOULD LIKE YOUR OPINION

INTERVIEWER DON'T READ ALOUD, WORDS IN CAPITAL LETTERS / CIRCLE APPROPRIATE NUMBERS OR CHECK BOXET

SUGGESTED	INTERODI	CTION
2000CE21ED	INIKUDE	יאטוגעו

Good day. I'm from the Gallup Organization, and I'd like to talk to you about a few topics on national public opinion and on marketin

	3. Have you taken any courses during the past year?
SECTION V ASK EVERYONE	YES1-1 GO TO Q. 5a
ASK EVERYONE:  a. Do you presently work outside the home full-ti	me
or part-time; or are you currently actively looking for work?	IF "NO". ASK: 4a. How about during the past three years - have you
FULL-TIME1-42 - GO TO Q.16	taken any courses in the past 3 years?  YES1°- GO TO O. 5a
HORK	1F "NO" TO Q. 4a, AMD CODE 2 OF Q. 2, ASK Q. 4b AND
NO, NOT WORKING, AND NOT ACTIVELY SEEKING4 - GO TO 0.2	b. Guring the next twelve months, do you think you may be interested in taking a course - either
IF "FULL-TIME" OR "PART-TIME", ASK: When did you first start working at the job	full-time, part-time or as an occasional student?
you are currently holding?  YEARS #9	YES1-49
ASK ALL WORKING FULL/PART-TIME OR ACTIVELY SEEKING	c. What reasons do you think might come up that would brevent you from taking a course?
MORK (0.1 - CODES 1.2.3):  C. About how long have you been a member of the labour force - would you say: READ LIST.	50 51
Less than one year1-45 One to five years2	
Six to ten years3 Over ten years4	54
ASK EYERYONE:	SKIP TO 0.16
Please look at this card and tell me which statement most closely applies to your situati HAND CARD 5 . ONE ANSWER ONLY.	on.
A. STILL IN SCHOOL AND HAVE NOT ASKIP INTERRUPTED MY SCHOOLING	TO Sa. Thinking of the courses you took in the past three years what type were they? RECORD BELOW FOR EACH TYPE OF COURSE STATED.
B. FINISHED MY SCHOOLING AND HAVE NOT TAKEN ANY ADDITIONAL COURSES OF GO T ANY DESCRIPTION2 - 0.4	
C. INTERRUPTED MY SCHOOLING FOR A PERIOD	
OF TIME, BUT HAVE GONE BACK AS A FULL TIME STUDENT	257
D. INTERRUPTED MY SCHOOLING FOR A PERIOD OF TIME, BUT HAVE GONE BACK AS A PART TIME STUDENT4	4
E. INTERRUPTED MY SCHOOLING FOR A PERIOD GO OF TIME BUT TAKE OCCASIONAL COURSES FROM TIME TO TIME	ASK THOSE WHO HAVE TAKEN MORE THAN ONE COURSE (0.5a): b. Which of the courses that you have just mentioned
F. INTERRUPTED MY SCHOOLING FOR A PERIOD OF TIME BUT PARTICIPATED IN SHORT DURATION PROGRAMS SUCH AS WORKSHOPS, DISCUSSION GROUPS, ETC	do you consider to be the most important to you personally? RECORD BELOW. ONE ANSWER ONLY.
G. OTHER SITUATION, BUT TAKE OR HAVE TAKEN PART IN COURSES7	ASK ALL WHO HAVE TAKEN A COURSE IN PAST THREE YEARS:
	6. By the way, thinking of (this/the most important) course you took, did you or did you not complete it? (THE ONE COURSE MENTIONED IN 0.5a, OR THE MOST IMPORTANT COURSE MENTIONED IN 0.5b).

YES-----2 NO-----2 STILL TAKING COURSE---3

7 <b>a.</b> °	Using this card to help you, please tell most important reason you had for taking course? HANC CARD 6 . OME ANSHER OHL RECORD BELOW.	this
b.	Which of the other reasons andly in your RECORD BELOW.	case?
	MOST IMPORTANT	
1)	TO GET A JOB AND/OR IMPROVE MY .EMPLOYMENT PROSPECTS1-43	1-44
11)	TO INCREASE MY CAPACITY TO UNDERSTAND AND PARTICIPATE IN WORK AND/OR UNION AFFAIRS2.	2
111	)TO ACCOURE NEW SKILLS THAT WILL HELP ME TO KEEP UP WITH MY JOB 3	3
1v)	TO IMPROVE MY ABILITY TO COMMUNICATE WITH OTHERS AND BE MORE EFFECTIVE IN MY RELATIONSHIPS WITH FAMILY AND OTHERS	4 -67
v )	TO OBTAIN A PROMOTION, A BETTER JOB, AND/OR TO INCREASE MY INCOME-5	5
vf)	FOR PERSONAL ENJOYMENT, INCLUDING RECREATION, DEVELOPMENT OF MENTAL, PHYSICAL, ARTISTIC ABILITY OR CRAFTSMANSHIP 6	6
	OTHER (SPECIFY)	7 -70
	NO OTHER REASON	8 - 7/
8.	NO OTHER REASON————————————————————————————————————	t ce your
8.	HAND CARD 7 For this (MOST IMPORTANT) course, to what extent did the following factors influent experience - either in a positive way, a	t ce your NOT IVE AT
â.	HAND CARD 7 For this (MOST IMPORTANT) course, to what extent did the following factors influent experience - either in a positive way, a negative way, or not at all? READ LIST.   OUT POSITIVE NEGAT HAY  Your work schedule	t ce your NOT IVE AT Y ALL
	HAND CARD 7 For this (MOST IMPORTANT) course, to what extent did the following factors influen experience - either in a positive way, a negative way, or not at all? READ LIST.  O4 POSITIVE NEGAT MAY WA	t ce your NOT IVE AT Y ALL
â.	HAND CARD 7  For this (MOST IMPORTANT) course, to what extent did the following factors influent experience - either in a positive way, a negative way, or not at all? READ LIST.  Out POSITIVE NEGAT HAY  Your work schedule	t your  IVE AT Y ALL 3
a. b.	HAND CARD 7  For this (MOST IMPORTANT) course, to what extent did the following factors influen experience - either in a positive way, a negative way, or not at all? READ LIST.  OUT POSITIVE NEGAT HAY WAY  Your work schedule	t ce your  IVE AT ALL  3
a. b.	HAND CARD 7  For this (MOST IMPORTANT) course, to what extent did the following factors influent experience - either in a positive way, a negative way, or not at all? READ LIST.  POSITIVE NEGAT HAY  Your work schedule	t ce your  IVE AT ALL 3
a. b.	HAND CARD 7  For this (MOST IMPORTANT) course, to what extent did the following factors influen experience - either in a positive way, a negative way, or not at all? READ LIST.  POSITIVE NEGAT MAY  Your work schedule	t ce your  IVE AT ALL  3  3
a. b. c.	HAND CARD 7  For this (MOST IMPORTANT) course, to wha extent did the following factors influen experience - either in a positive way, a negative way, or not at all? READ LIST.  POSITIVE NEGAT HAY  Your work schedule	t ce your  IVE ATTY  ALL  3  3  3
a. b. c. d.	HAND CARD 7 For this (MOST IMPORTANT) course, to what extent did the following factors influent experience - either in a positive way, a negative way, or not at all? READ LIST.  POSITIVE NEGAT HAY  Your work schedule	t ce your IVE AT ALL 3 3 3 3 3
a. b. c. d. g.	HAND CARD 7 For this (MOST IMPORTANT) course, to wha extent did the following factors influen experience - either in a positive way, a negative way, or not at all? READ LIST.  POSITIVE NEGAT HAY HAY  Your work schedule	t ce your  IVE ATTY  ALL  3  3  3  3

b. And how many weeks did it - or will it - last?

W	0 0	ffered	ed the this only.	e course	e you	took - that i	157.
	уо	ur emp	loyer	?	-1-18		
	yo	ur uni	on?		2		
	a a	Commu:	nity :	ollege.	CGEP		
	th	e scho	od lo	ard			
	ā	volunt	ary a	SSOCIAT	10n		
	ОТ	HER (S	PECIF	Y )			7
							/1
ASK	ALL	WORKIN	G FULT	L/PART	TIME 0	R ACTIVELY	
SEEK	ING	KING A	Gain	CODES	1,2,3)	you took wit	hin
	the	last 3	year:	s, when	did t	his course ta	ke
	plac	8 - M9	s 1t.	READ	LIST.		
		comple	tely o	iuring	your		
		WOFKI	ng no	ırs		-1-20	
		partly	durin	ig your		2	
			_			- 6	
	1	ot du	ring	your wo	rking	-3'- SKIP TO (	
		nours	46 41			-3'- SKIP 10 1	1 - 14
					NG WOR	KING HOURS"	
			1 OR		0214	while you too	in manual
16.	cour		ncinu	e to be	. paic	while you too	K Eni
		VEC	-1 -2	,			
13.			sewhe:		lace a	t your place	of
				OF HORK			
			,				
ASK /	ALL C	OURSE	TAKER	s (n.s)			
14a.	Plea	se loc	ok at	this ca	rd.	AND CARD 8 .	_
	IMPO	RTANT	ne wni ) cour	se you	took	s to the (MOS	T
							l=al2
	1	HE TU	HAS NU	FEE WAS	UNDE	1 _23	
		\$100				2	
	1		ITION ORE	FEE WAS	3100	3	
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ASK:							37.
b .	Ano	DIEG	ו צות:	22 - Wa	s it.,	READ LIST.	
	_ Y	ourse	1 4?	1 - 6	0 TO (	1.14c	
	Y	our er	ubjohe	r?	2		
				nt?		SKIP TO	
						→ 0.14d	
	0	THER	(SPECI	FY)			
	-				5		
					25	-	
	¥ .	VALIBE	P1 P2	154			
с.	Dia	you.	ELF".	you int	end to	aeduct this	
	fee	from y	your t	axable	income	, when you	
					ne tax	return?	
			-1 - 2				
	N	U	2				

	ALL COURSE TAKERS (0.5):
d.	Thinking of other costs that you might have incurred in taking this course - such as
	transportation, babysitting, books, materials
	etc which of these HAND CARDO apply
	to your course?
	THERE WERE NO ADDITIONAL
	COSTS INCURRED1-27
	ADDITIONAL COSTS INCURRED
	WERE LESS THAN STOO2
	ADDITIONAL COSTS INCURRED
	4ERE 5100 OR MORE3
1 =	"ADDITIONAL COSTS INCURRED" ARE \$100 OR MORE
	14d - CODE 3). ASK:
e.	and paid these costs - was it AEAD LIST.
	Yourself?1 - 28
	Your employer?2
	The government?3
	Your union?4
	OTHER (SPECIFY)5
	29-
ASK	ALL WORKING FULL/PART TIME OR ACTIVELY
SEE	ING WORK (Q.1a - CODES 1,2,3):
15.	With the advent of computer technology, labour saving machines and other changes in the
	workplace, many people have found their jobs
	changing or becoming-obsolete.
	Considering your experience at work during
8.	the past five years to what extent is (was)
	your job already affected by:these changes?
	Would you say your job is (was) affected READ LIST.
	KEWA F121°
	to a great extent1-30
	to a Slight extent2
	not at all3
	DON'T KNOW4
	•
<b>b</b> .	Do you think there is a good chance that
	your job will be affected by this in the next five years? Do you think it
	READ LIST.
	definitely will be affected1-3' probably will be affected2
	probably will not be affected3
	definitely will not be affected4
	DOM'T KNOW5
c.	Still considering the changes occuring in the
	workplace, would you say that the people you
	are working with are concerned about what's
	going on? On the whole, do you think they are
	urum raat.
	very concerned } -32_
	slightly concerned2
	not at all concerned3
	DON'T KNOW4
	en la la calua adudan de canala ubana daba
d.	If you had to give advice to people whose jobs had been affected by changes in the workplace.
	what specific advice would you give to help
	them cope with or adjust to these changes?
	18
	. 34-
	37
	36

ASK EVERYONE:

16. Some people in Canada think programs should be available to enable working people to take time off, on a short-term or part-time basis, to improve skills or adapt themselves to the changing workplace. They would still continue to earn income during courses and they would return to their job upon completion.

a. If this practice were established in Canada, would you tend to be in favour of it or not?

YES FAVOUR---1-39
NO. DO NOT----2

OON'T KNOW-----3

IF "IN FAVOUR", ASK:

Which of the following should be most responsible for encouraging such a program?

HAND CARD 10 .

SASIC DATA <u>INTERVIEWER: INTRODUCE THIS SECTION:</u> That I can be sure I am petting t	ON AS FOLLOWS: "Now may I ask you a few questions so ne right sample of people in this community?"
MEN: Are you the male nead of the household?  WOMEN: Are you the female head of the household?  YES	CCCUPATION OF HEAD OF FAMILY  SPECIFIC JOB?  TYPE OF COMPANY?
ASA EVERYONE:  Are you employed outside the home full-time, part- time or not at all?  FULL-TIME	How many people, including yourself, are there in this household?  7/- 1 2 3 4 5 6 OR MORE
ASK EVERYONE  What is your marital SIMGLE1 status?  MARRIED2 WID/DIY/SEP3	How many would be under 10 years?  72- 0 1 2 3 4 OR MORE  How many would be between 10 & 17 years?  73- 0 1 2 3 4 OR MORE
What was the language you first spoke in childhood and still understand?  ENGLISH	Are you, yourself a member of a trade union, or 1 your husband/wife a trade union member?  YES, MYSELF
Now for a question on religion. What is your religious preference - Protestant; Roman Catholic or Jewish?  PROTESTANT	What was the year of your birth? YEAR: 75/2  RECORD IF: MAN
NC RELIGIOUS PREFERENCE	to your total annual family income from all source before tax deductions?  UNDER \$10.0001-76 \$20.000 - \$24.990 \$10.000 - \$14.9992 \$25.000 - \$29.390 \$15.000 - \$19.0993 \$30.000 - \$30.990 \$40.000 \ 0'ER
PUBLIC/GRADE SCHOOL	RECORD IF: FARM
OTHER 5 6  NO FORMAL SCHOOLING9 REFUSED0	
What is your occupation?  SPECIFIC JOB:  TYPE OF COMPANY: 69-4	TIME INTERVIEW ENDER:
CHECK IF: ( ) STUDENT ( ) HOUSEWIFE	
(PLEASE PRINT)  NAME OF RESPONDENT:	TELEPHONE:
ADDRESS:	CITY: 3804-

POSTAL CODE:

I HEREBY ATTEST THAT THIS IS A TRUE AND HONEST INTERVIEW --- INTERVIEWER'S SIGNATURE:

DATE OF INTERVIEW:

<sup>---</sup> A VALIDATION CHECK WILL BE MADE ON ALL INTERVIEWERS' WORK

page 127 APPENDIX B.
ORGANISATION FOR ECONOMIC
CO-OPERATION AND DEVELOPMENT

RESTRICTED
Paris, 10th June, 1982
English text only

Centre for Educational Research and Innovation

CERI/RE/80.07

### Paid Educational Leave with Particular Emphasis on its Financial Aspects

- 1. The attached document has been prepared by Professor Louis Emmerij, Rector of the Institute of Social Studies at The Hague, as a contribution to the project on the Costs and Financing of Recurrent Education. It has served as a discussion paper at two national conferences on this topic, jointly organized by CERI and the responsible national authorities, which were held in Stanford (US) and in Bremen (Germany) on 10th-12th July and 30th September-2nd October, 1980, respectively.
- 2. The paper will be published shortly as part of the proceedings of the respective conferences which will be available both in English and German. The English version will be contained in the following volume: H. Levin, H.G. Schütze (eds.), Lifelong Learning The Concept and Finance of Recurrent Education. Beverley Hill, Calif. (Sage Publications), 1982 (forthcoming).
- 3. The findings presented and the opinions expressed in this paper are those of the author and, as such, do not reflect the positions of the OECD, or the national authorities concerned.

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# PAID FDUCATIONAL LEAVE WITH PARTICULAR EMPHASIS ON ITS FINANCIAL ASPECTS

#### 1. Introduction

It is because paid educational leave has the advantage of meeting a variety of societal objectives that, dependent on the economic and social situation, one of those objectives could and should be given greater stress than others.

It is for that reason that in the discussion on educational leave in the Netherlands, I have stressed the desirability of placing that discussion in the context of the current employment situation. It is my conviction that the industrialized countries will be quite unable to return to full employment as defined today, during the 1980's.

It is not my purpose here to go into details in order to support this assertion. It has much to do with the slowdown of the rate of economic growth in the industrialized countries, however, as opposed to a continual increase in the number of people who present themselves on the labour market in search of employment in the majority of OECD countries.

The rate of economic growth will not be such that full employment can be maintained, given present technologies and in particular the forthcoming micro-electronic and information revolution. If too few jobs can be created, something different must be done to infuence the people who present themselves on the labour market from the present method namely by throwing them out of employment. Constructive interventions on the supply side of the labour market must be flexible however, in the sense that if, during the 1980s for example, a different labour market situation emerges - given also demographic tendencies - it must be possible to adjust policy measures on the supply side of the labour market accordingly. This is an important constraint on any search to identify such measures. The debate has only just started in the OECD countries and although much has been heard about measures such as shortening the working week and early

retirement, no clear line of conduct has yet emerged. This is therefore a favourable time at which to present viable alternatives so that they may be considered in the debate which, I am sure, will become even more intense in the very near future.

The bulk of this paper is written in my personal capacity, partly in the light of my recent book, which was in Dutch. Later in the paper I shall attempt to compare my personal opinions on the matter with the ideas of the tripartite committee on paid educational leave, of which I am chairman.

## 2. Alternative ways of intervening on the supply side of the labour market

In the auberge espagnol of proposed policy measures, at least six can be easily identified.

#### Early retirement

Although there is a lot of talk about reducing the retirement age from  $e^{\pi}$  to 63, it is quite clear that such a measure would not amount to anything substantive with regard to creating additional employment opportunities. In the Netherlands, for instance, more than half the people in the age group 63 - 64 already draw on social insurance funds for those declared unfit for work. Of the remaining number of elderly workers, more than half occupy places that are bound to be abolished in due course for reasons of rationalization and streamlining. All in all, perhaps 20 to 25% of working places presently occupied by older workers will be vacated which can and will be filled by younger workers. Moreover, the measure is somewhat of a contradiction in terminis. More and more people in our day and age in most industrialized countries feel fit and well for much longer than was formerly the case. In this context, it is interesting to note that retirement age in the United States has been postponed till 70. The conclusion must be that this measure may be fairly simple to introduce, but that it is not very effective towards solving the unemployment problem.

<sup>1</sup> L.J.Emmerij and J.A.E.Clobus, Volledige werkgelegenheid door creatief verlof - Naar een maatschappij van de vrije keuze (Full employment through creative leave - towards a society of free choice): Kluwer, Deventer, Holland; 1978

#### Extension of compulsory education

Here more or less the same reasoning applies as for early retirement schemes. A measure to extend compulsory education until, say 18, is rather defensive because it strives to keep young people from entering the labour market. But far more than half the young people in the age group 16-17 already attend school. Of the others, not all enter the labour market straightaway. Again, therefore, the actual percentage that is prevented from entering the labour market is approximately 20-25%. These young people are detained at school more or less against their will. In the end only some tens of thousands of working places will be gained, but unemployment figures run well into hundreds of thousands.

It might perhaps be said that to keep youngsters from lower social circles longer in school, serves an important socio/cultural end, by bettering their chances to improve their educational backgrounds. But this aim can be achieved in another way, as will be shown later in this paper.

It should be borne in mind that keeping young people in school against their inclinations will result in poorer qualitative results, will draw heavily on a country's education budget, and may cause the youth to look at school with a lasting distaste.

#### Longer holidays

This alternative is only mentioned here for completeness' sake, because unless holidays become very much longer (and then we shall really have a situation of paid educational leave), such a measure would hardly achieve tangible results in employment terms. Moreover, it has its disadvantages, ranging from shops having to be kept closed for much longer periods to even stronger stimulation of mass tourism and this while we are just beginning to realize that such things do not make us any happier. In the end, nothing would be achieved by such a measure, unless it is turned into paid educational leave, as set out below.

#### Shorter working-weeks

This measure will probably not achieve tangible results in the middlelong term. Employment or unemployment tends to remain constant whether the working week is of 48, 40 or 35 hours. In the past, employers have heavily opposed a reduction of working time, but time and again we have seen that ultimate results were not too bad owing to the adaptability of people and to the improvement of labour productivity by the introduction of technological innovations.

Trade unions now go to the other extreme in thinking that more working places can thus be created. In my opinion, this is just about as naive as the employers' stand. In no time technology and productivity would catch up with the new situation and we should be faced once more with the necessity to find other ways and means of shortening working hours. Moreover, scarce know-how and skills will become even scarcer, and housewives will be at their wits' end because shorter working hours away from the house will mean more time spent there creating additional chores.

#### Less working-hours per day (a five-hour working-day)

This approach implies not so much that additional working places will be created, as that the available quantity of work will be divided among more individuals with all the negative income consequences.

working-place - one occupant to one working-place - two occupants. These two will together earn at least as much as the one person before and together may well have greater productivity. Another consequence is that more persons (housewives foremost among them) will be able to do paid work away from home. It is therefore hardly to be wondered at that women's lib. movements, in particular, favour this idea: not only will paid work be divided, but also the unpaid (house) work. It also means, however, that everyone will be more or less obliged to seek a partner, not only to share life with but also in order to enjoy full income!

Markets will develop in which single people advertise for partners of similar professional level and interests. Although this does
not have to be bad in itself, it does carry some dictatorial aspects
unless one thinks in terms of a more subtle and differentiated approach.
But this would have consequences for the effectiveness of the proposal.

For example, if greater flexibility enabled one individual to do two jobs, the effects would be completely annihilated or even reversed. In such circumstances many individuals would probably tend to work 10 hours a day instead of five.

Summarizing, the proposal implies that two people will have to work in order to earn one average income; otherwise the whole system would have reverse effects on the employment situation and on the economy as a whole. Moreover, given the complexity of the system positive results are by no means assured.

## 3. Proposal for a flexible mix of work, recurrent education and leisure time.

We believe that a different and more comprehensive approach is required to reduce the amount of time which individuals spend on the labour market during their lifespans. Such an approach would not be limited to relatively unimportant measures of labour market policy, but would consist of a more global package, including educational policies, labour market policies, social policies, combined with economic restructuring and development cooperation policies.

It is our opinion that a social and cultural policy package should be proposed, in addition to purely economic proposals. The foremost characteristic of the new package is that it would combine a progressive policy with leaving the greatest possible initiative to the individual, who would thus have more control over shaping his career and life pattern than is the case at present. Such a global approach must also be able to deal with the rationing of labour, but as by-product rather than as its major, or even sole, objective. What would be the contours of such a global approach to the unemployment problem in industrialized countries?

The life of an individual is divided into three parts, separated in most countries by watertight partitions:

- (i) the period spent at school and, for the more fortunate, at university
- (ii) active life, whether spent on the labour market or not; whether re-

These periods follow one another sequentially. We go to school at an early age and remain there until 16 or 18, (depending on the country) and, in the case of university students, very often up to the age of 25 or even older.

Then we enter the period of so-called active life until the age of 60 to 65, when we are kindly but firmly asked to go out into retirement. It is very difficult - particularly in most European countries - to reverse the sequence of these three events.

The essence of our proposal is to transform this rigid sequential system into a more flexible recurrent system, in which it will be possible to combine or alternate periods of education, work and retirement throughout a person's adult life.

The idea of recurrent education which cuts through the first two periods of life mentioned above, was launched some ten years ago and has been discussed ever since. The complementary idea of retirement à la carte has been discussed less frequently, but is the logical extension and the mirror image of recurrent education because it cuts across the second and third periods. Individuals could even be given the opportunity to combine all three periods by, for example, taking at age 30 a period of six months of anticipated retirement in order to continue or resume further education. Although this sounds extremely straightforward and simple, in reality it amounts to a social and cultural change of the first order.

Before going into somewhat more detail, it is important to stress the advantages of such an approach for the various partners, social and individual, in our countries.

In the first place, this much more flexible approach would enable an equally flexible labour market policy to be introduced which would have advantages both for employers and for workers. The employers would obtain a labour force which could be more easily and more quickly retrained in line with technological changes. The workers would have easier and more frequent chances to re-orient themselves.

The educational system as it exists at present is extremely rigid and has long time-lags. These were some of the reasons why in the 1950's and 1960's forecasts of occupational and educational structures

of the labour force became fashionable. These were long-term forecasts due to the long gestation periods inherent to the educational production process. Indeed, it takes approximately six years to complete each of the main levels of the educational system. Hence, the school will react very slowly to changes in technology which, in turn, have implications for the required skill structure of the labour force.

Experience has shown that it is nigh impossible to make more or less reliable long-term forecasts of the occupational and educational structures of the labour force. It is therefore much more realistic and desirable to shorten the gostation periods because, by doing so, the educational system will become more easily adaptable. In other words, the relationship between school and work will become closer, more effective, and more beneficial to all parties.

In the second place, there is a specific advantage to the individual in terms of self-fulfilment and of being able to better realize his full potential.

We all know that motivation occurs at very different moments in a person's life and not necessarily at those points in time required by the sequential educational system. Educational opportunities and achievements will definitely be enhanced if individuals can go back to school when they are motivated to do so instead of being pushed by parents or by other persons in authority to remain in school. These people are right, of course, because in the present set-up it is difficult to return to school once your have dropped out.

What is true for educational opportunities is equally true for occupational and income opportunities. In the global approach which we favour, the individual has more than on occasion to (re-)orient himself in the labour market. We go even further and offer individuals the possibility to take a period of anticipatory retirement earlier in life, during which they do not necessarily have to return to school but can do other things for which they are strongly motivated at that particular time of their lives.

In the third place, its flexibility also makes our approach an effective anti-cyclical weapon. At times when a particularly strong but temporary economic storm flays our countries, more people could

be encouraged to withdraw for a while from the labour force in order to benefit from recurrent education or from a sabbatical period.

In the fourth place, and this is also an anti-structural weapon, we shall have on average fewer people on the labour market at each point in time than is presently the case because - and again on average - people will spend more time in the first and third blocks of their life as compared to the second. In this way, total labour supply will diminish.

The approach we advocate is thus on the one hand a generalization of traditional trade union demands for shorter working hours, more holidays and earlier retirement and, on the other hand, of the more recent proposals with respect to part-time work, the sharing of jobs, and the rationing of labour supply in general.

Our global approach thus kills several birds with one stone: the economic structural limits for once will be consistent with the socio-cultural objectives of the individual. Instead of a diminishing majority which works harder and harder and an increasing minority which is expelled shamefully from the labour market, we are proposing that available work be rationed more intelligently and more comprehensively than has been suggested so far.

Let us look at the various dimensions intervening on the supply side of our approach in just a little more detail.

First, there is the necessity to introduce a system of recurrent education after the compulsory schooling period. There are almost as many definitions of recurrent education as there are people who believe they know what they are talking about! For many it is a second chance, parallel next to the full-time formal educational system. This is definitely not the case. Recurrent education, as we understand it, is a comprehensive and flexible post-compulsory educational system which combines the present formal educational branches and the various types of adult education. Recurrent education, therefore, does not necessarily imply creating additional types of education and training, but the integration of existing types into one harmonious whole.

In order to speak about recurrent education, four conditions must be met:

- (i) it must be able to receive people from all age groups;
- (ii) it must be one integrated education and training system, as indicated earlier
- (iii) it must offer "educational units" of variable and flexible duration which can be used as building blocks for, and stepping stone towards, obtaining a diploma or degree; and
- (iv) it must have exit possibilities at different levels which are all to be awarded with a diploma or degree.

A few words on each of these four points.

On the first point, it is to be expected that most youngsters who decide at the age of 17 or 18 to postpone the continuation of their studies for a while, will resume their schooling between their 20th and 30th birthdays. This makes sense from an individual and therefore private rate-of-return point of view. It also makes sense from the macro-economic and therefore social rate-of-return view-point. Were people to decide to start their university education at, say 55, they could not expect to receive important material returns in terms of income during the rest of their lifetime - nor could society. It is to be expected that as people grow older, they will prefer to take up stretches of anticipatory retirement in order to do other things than to return to school.

The second point is important because in our approach individuals must be able to travel along alternative educational paths and still achieve the same educational goal. People must have the opportunity to obtain the same "credits" by spending, say, 52 long weekends at school as by attending full-time education during a period of three to four months. This flexibility must be built into the recurrent system, otherwise it cannot cope with the much greater variety of students and circumstances as compared to today's situation.

This is much more easily said than done - hence the third point, namely, to introduce educational units which in relatively short time periods can provide a well-rounded part of a given educational career. The student or participant can thus build up credits in a flexible

manner and does not lose them because they contribute to the total credits necessary to obtain a particular diploma or degree.

The fourth and last point refers to the necessity for recurrent education to have exit possibilities at different levels so that we do not fall into the all-or-nothing trap of current educational systems.

In summary the educational characteristics of our approach are the following:

- (i) to hold as many options open for as long a period as possible
  - (ii) to transfer to a later age the emphasis on pursuing higher levels of education in order to interrupt the rat race of spending more and more years of education in the existing sequential system, even when there is no real desire to do so;
  - (iii) to integrate formal and non-formal types of education

Then we have the <u>labour market policy</u> component. Our proposals will have positive effects on the structural, cyclical and individual levels of labour market policy. These have been mentioned above and a brief reference will suffice here.

On the structural plane, our approach will be instrumental in creating a better linkage between the changing skills required on the one hand, and the educational and training supply delivered by our recurrent educational system on the other. There is no doubt that one of the more important structural problems that we face in our industrialized countries, namely, the growing mismatch between skills required and qualifications supplied, will be effectively countered by our proposals.

On the cyclical plane the government, through appropriate incentives, can stimulate relatively more people to leave the labour force temporarily during an ebb tide of the economic situation. But more precise targets can be attained. For instance, the government could well direct such measures to a specific sector of the economy or to specific groups of workers in the labour force. This could be done by giving higher financial rewards to people working in that sector or in that specific group - higher rewards to withdraw for a given period of time into education or training. In other words,

paid educational leave need not necessarily be the same from one group to another, from one sector to another, or from one period of time to another.

On the individual plane the advantages of our proposals for individuals to re-enter the labour market or to change within it are obvious and reflect those mentioned under the structural and cyclical components.

There is, however, one additional point which needs to be emphasized. This refers to the possibility for the individual to obtain an orientation-period on the labour market between terminating his compulsory schooling and starting recurrent education and training. During this period youngsters who have not yet firmly decided on their professional career will have the possibility to sniff at various job opportunities. This would replace the training periods of today - training periods which are very often neither education, nor training, nor work, but fall between all these stools.

A third dimension of our package is related to <u>income distribution</u>. What would be the implications of the system of recurrent education and leave for the income distribution of our countries? The "perverse" effects on tertiary income distribution of additional educational and other facilities have frequently been noted. Indeed, in most cases education is provided at strongly reduced prices through government subsidies, which come from taxes paid by all. On the other hand, we know that those who attend higher levels of education frequently come from the higher social classes. Such a situation is a clear example of how the poor subsidize the rich. This is one illustration of "perverse" effects of providing not only educaton, but also health and other facilities at subsidized prices.

We must therefore take care that paid educational leave is granted as a matter of priority to those who have not been able to benefit optimally from educational facilities when young. In other words, a positive discrimination must be introduced in order to counter the perverse effects.

Still on the subject of income distribution, Jan Tinbergen has drawn on time series from the Netherlands to show that education

has expanded faster than warranted on purely economic and technological grounds. This apparent educational over-supply has resulted, in a narrowing of income disparities between people with different levels of educational attainment. If his conclusions are correct and can be generalized to situations in other countries, it would follow that air proposals could have further positive implications for income distribution while at the same time maintaining a somewhat better balance between the demand for skills and the supply of qualifications.

Another implication - and this is a fourth dimension of our proposal - would be to create a better work climate. The genuine possibility that people would have occasionally to withdraw from the labour force is likely to diminish the number of those who declare themselves sick or otherwise unfit for work. Absenteeism due to sickness is a growing problem in most countries. Very often it is due to the fact that people work for too long a period under great stress. The safety valve provided by voluntary withdrawal could make a big difference.

Moreover, people who withdraw voluntarily from the labour force are in a very different psychological situation to those who are forcefully expelled. Pressure on health facilities can therefore be expected to diminish, implying a considerable saving of money in the health and welfare sectors - money that can be used to contribute towards financing our proposals. Finally, our policy package will almost necessarily imply the harmonization of the entire social security system. This also means that the great variety of pension schemes now in existence must be integrated in such a way that people are no longer confronted with bureaucratic problems when moving from one firm to another, or from one job to another, with respect to rights to retirement benefits.

<sup>2.</sup> Jan Tinbergen: Income Distribution: Analyses and Policies (North-Holland Publishing Company, Amsterdam, 1975).

## 4. The financing of paid educational leave

Many may be inclined to think that the approach at the heart of this paper is a very positive way by which to cause unemployment to disappear by redefining the concept of full employment. On the other hand, the costs involved might be such as to render its realization unlikely, particularly if large numbers of people were to be involved during the initial stages of introduction of paid educational leave, as indeed should be the case. This would be judging too fast, however. Part of the trick - and this is where it ceases to be a trick - is to use the money now invested in social security schemes of all kinds to finance our proposal concerning recurrent education and leave.

Those who will benefit from our approach will consist of two groups:

Firstly, the youngsters who, after having finished compulsory education continue immediately with what will then be recurrent education; Secondly, those who, after having worked for a certain period of time, withdraw voluntarily into a period of paid leave.

The financing of these groups will come from different sources. The cost of the first is now carried by the Ministry of Education's budget, combined with tax and other facilities granted to the parents involved. In our approach, the financial resources, inasfar as they come from different budgets, will need to be centralized.

In practice, this will amount to the granting of a student salary and to the abolition of present tax and other facilities.

During periods of paid leave, the incomes of those in the second category must come from the amounts that are <u>now</u> paid by social security facilities to people who are involuntarily expelled from the labour market. We refer to those of the unemployed who are declared to be 'unfit for work', and to some of those who are 'sick' and who, through health insurance schemes, can be viewed as disguised unemployed.

We have calculated the magnitudes involved in the Netherlands, regarding people who fall under unemployment benefits, unfit-for-work benefits, and sickness insurance respectively, but who should in reality be classified under 'structurally unemployed'. In other words,

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the groups that we have tried to separate from the rest consist of people who are either openly unemployed or are unemployed in a more or less disguised manner, and who find themselves in those categories because of the structural unemployment problem in the industrialized world.

The essence of such calculations is to estimate the number of people that can withdraw voluntarily into paid educational leave at any point in time without additional costs being incurred by society, as compared to the present expenses involved in unemployment and social security schemes of all kinds to ensure the incomes of those who are either open or hidden unemployed.

In estimating the potential size of the group that could take advantage of paid educational leave in the Netherlands, we must start by examining the number of young people aged 17 or over who are at present in the educational system. Next, we must estimate the total amount of structurally unemployed people, most of whom are hidden in a variety of social insurance schemes.

To estimate the number of pupils and students aged 17 and over is a straightforward business. In the Netherlands they now number about 350,000. Let us keep this number at the back of our minds, and turn to the more difficult task of estimating the total size of the structural unemployment problem

The situation in the Netherlands is illustrated in Table I where we find the 350,000 pupils and students and a breakdown of the 377,000 people at present in a position of structural unemployment.

Estimated possible withdrawals from the labour market without additional cost (in thousands)

Table I

1976

Social insurance	Total number	Of which structurally
group		unemployed
I	93	20
II	380	190
HII	244	112
. IV	222	55
90		
		·
TOTAL:	939	377
Pupils and students		
of 17 and over		350 +
ngs cap can no ma		
People who could potentially make		
use of paid edu-	A	
cational leave	•	727
40 T T T T T T T T T T T T T T T T T T T		

Source: Emmerij and Clobus, op.cit., 119

The social insurance categories according to which these people are paid are indicated by numbers I - IV because the exact names have little meaning to foreign readers.

Categories I and II represent those social security facilities that accommodate people who are declared unfit for work. Category I

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has been introduced fairly recently and it is here that we find most real cases of people who, after having met with working accidents or otherwise, are indeed unable to continue working for some period of time. Category II is 'easier': according to our estimate, approximately fifty per cent of those so classified are in reality quite fit to work but are often put under this umbrella for humanitarian reasons. For example, about half the labour force in the age bracket 55-64 are found in this category. It is unlikely that all these people have been hit by an epidemic, and the only realistic explanation is that doctors tend more easily to certify people in that age group as 'unfit for work' when they are in any case about to lose their jobs.

Since it is extremely difficult for such people to find new employment and since the amount of income received under category II is favourable as compared to unemployment benefits, it stands to reason that this category hides large numbers of people who otherwise would be openly unemployed.

Category III is that of the open unemployed. Without going into calculation details, we estimate that half the people to be found here are structurally unemployed, the other half being cyclically unemployed. In other words, it is our conclusion that in a country such as the Netherlands there will always be about 100,000 persons frictionally unemployed.

Category IV represents those who are 'absent through sickness for longer than three days'. Actual absenteeism through sickness in the Netherlands is double the amount given in Table I, but most people report back to work within 1 to 3 days.

A conservative estimate is that approximately 25% of these people are on 'avoidable' sickness leave and thus fall under our category of structurally unemployed.

We now arrive at the quite astonishing outcome of close to one million members of the Dutch labour force being absent from work at any point in time, i.e. about 20 percent of the total labour force. Out of this huge number about 377,000 are absent because of structural unemployment. If we add the 350,000 pupils and students aged 17 and over, we arrive at the potential size of the group that could

make use of paid educational leave without additional costs being incurred by society: i.e. 727,000 people.

In other words, close on 730,000 people in the Netherlands could make use of recurrent education through paid educational leave and receive between 75 and 85% of their most recent income, or a student salary. This would not represent a bigger financial outlay than is now found in the budgets of the Ministry of Education and Sciences and of Social Affairs respectively.

Instead of spending the billions of guilders involved for negative reasons, i.e. expelling people from their working environment or forcing young people to remain at school while the majority would prefer to do something else before eventually returning to the educational system, we propose that this same amount of money should be used for positive reasons.

Our approach creates a new form of income maintenance for periods of inactivity. The difference is that involuntary inactivity for some (normally the weaker groups of society) is replaced by periods of voluntary non-working for all.

It will not have gone unnoticed that our reasoning so far has focused on the financing of people's income during periods of voluntary with-drawal from the labour force. We have indicated that there are no additional costs involved as long as one substitutes a positive use of social security funds for the present negative use. This does not mean that no other costs are involved.

For example, it is likely that more educational facilities in terms of buildings and teachers will need to be provided. But here again, one must first look at the existing capacity. In the Netherlands we are going through a demographic period that will result in smaller generations. This, in turn, will have consequences for the employment of primary and secondary school teachers and for the utilization of school buildings. The education industry, like many other industrial branches, no longer functions at full capacity. Buildings remain empty and many school teachers are unemployed.

In such circumstances, it would again be comparatively inexpensive to make use of existing idle capacity to enable more people to return

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to school through paid educational leave. This example is given to indicate that additional costs caused by the introduction of a scheme like the one presented, need not be as disastrously high as defeatists would like to suggest.

Back therefore to the main theme, namely, the utilization of social security funds for the financing of educational leave. Clearly, there are a certain number of problems, but also possibilities. First of all, one might wonder whether it is realistic and indeed responsible to use funds that are typically meant to remedy cyclical difficulties for the solution of structural problems. In other words, the argument is that such funds are meant to help people in periods of difficulty which are normally of limited duration; for example, sickness or working accidents which make people unfit for work for a few weeks or a few months at the most, unemployment mainly of the frictional type, etc. In the present proposal these funds are largely set aside for something else, namely, educational leave which is meant to be with us forever, albeit for rotating groups of people. This argument is valid for as far as it goes, which at present is not very far. Indeed, I have already explained that social security moneys are more and more used to alleviate or to hide structural unemployment problems, and this assertion has been quantified in Table I above. The statement that these funds are used mainly for cyclical purposes is thus already becoming less true. We are witnessing the fact that social security funds are increasingly used to face up to a structural unemployment situation which, as explained earlier in this paper, will surely last throughout the 1980s. This being so, it would be more honest to recognize this fact and to separate out those funds that are to be used for cyclical purposes as opposed to the rest, as has been done in Table I.

Some people, while agreeing with the reasoning so far, will continue to argue in favour of using the structural slice of the funds for the creation of employment, particularly in the public sector, rather than "throwing it away in favour of educational leave". I have said at the beginning of this paper, and I repeat it here, that the creation of employment opportunities remains a first priority.

But what are we to do when maximal effort in that respect is not sufficient to supply all those who present themselves on the labour market with productive work. "Productive work" is indeed the key phrase. We would not be interested, I presume, in creating jobs 'à tout prix', even jobs of the most unproductive and unnecessary kind. Is it not much better and also more productive to use the "structural money", not only to give people the opportunity to return to the educational system, but also time to do other things, including voluntary activities in the public sector for example. The educational part of creative leave would make people more productive, more flexible, and in general more inclined to follow and anticipate changes in their work-environment. The non-educational part of creative leave would enable individuals to channel themselves into activities which they themselves consider to be useful. The chances are high that such activities will at the same time be more useful, and therefore more productive, for society at large than the creation of hosts of additional jobs in the public sector, which would then not only tend to become top-heavy, but also more and more bureaucratized and tainted by interest-groups and other lobbies. It is my conviction that this debate between those who favour expansion of the public sector through means imposed by the government on the one hand, and those who want to give opportunities and insights to individuals on the other, will become one of the principal controversies of the 1980s, cutting straight across existing political parties.

A second problem in proposing to use social security funds for more positive purposes such as educational or creative leave, is that of legal constraints. In some countries, for example, if an unemployed person types a letter to a sick relative and an inspector happens to look through the window while he is doing so, that person risks losing his unemployment insurance because he will be acccused of working. This is no exaggeration!

In the case of the Netherlands, where stringent regulations also hold, there is a clear tendency to take a more positive view towards the more flexible use of sazial security funds, including educational

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purposes. A constructive exchange is now taking place between the Dutch social security council and the committee for paid educational leave of the social economic council about this very topic. I shall revert to this in the final part of this paper.

A third problem, or possibility, is that concerning the introduction of incentives and disincentives to stimulate or discourage certain groups in society to take up educational leave. I have already mentioned the necessity for policy measures on the supply side of the labour market to be <u>sufficiently</u> flexible and even reversible in order that possibly in the 1990s, we may face a totally different situation on the labour market. In other words, we are concerned with the general problem of how to ensure that the "right" number of people, having the "right" composition, withdraw voluntarily from the labour market at any point in time.

Overall, the total number of people involved might be influenced by changing the percentage of income to be paid: instead of proposing the payment during the leave period of, say, 80 percent of the latest income, this could be increased to 35 and in certain cases even to 90%, in order to make it more attractive for more people to take up the opportunity. The 'prices' could be differentiated, for example, by proposing a higher percentage for people who want to go in for educational courses that are in high demand on the labour market, than for those who want to go elsewhere. Along the same lines, people working in certain economic sectors could be stimulated more than those working in other branches of economic activity.

These steering mechanisms, which any government has at its disposal, should be used to the full; in fact, the possibility of doing so is one of the original aspects of the proposal.

Finally, there is the problem of how to start the whole scheme, assuming that all other obstacles have been cleared. If the proposal is to be of any real benefit to the employment problem, it is essential that people who are not in productive employment decide at the outset to take up educational leave. But that is not all. Not only must we

have many quinea pigs, but their working places must be taken by people who are now unemployed. Only in this way can we in due course replace structural unemployment by educational or creative leave. Otherwise, we shall be faced with an accumulation of structural unemployment and educational leave. The whole proposal would then break down. Therefore, we have a matching problem on our hands: how to make sure that those who withdraw voluntarily into educational leave have more or less the same qualifications as those who are at present unemployed. In this connection, it is clear that we must start by convincing those workers with the lowest educational and training backgrounds to get out first. This will kill two birds with one stone: first, these are the people for whom educational leave is relatively the most useful; second, it is in this category that we find the bulk of the unemployed.' In other words, the matching problem in this situation would be much easier than in any other, and also more productive. The question of how the guinea pigs and all those who take advantage of educational leave thereafter can ever be re-inserted into the labour market, is very easy to answer. Once the operation has started, a group of people will be away from the labour market at any point in time. This will be an ever-changing, rotating group; by the time the guinea pigs return from their educational leave, another group will have just gone into voluntary retirement. Their places will therefore be vacated and will be refilled by the guinea pigs, etc. etc.

#### 5. The Dutch debate

Above I have presented my personal views on the question of paid educational leave and its sources of finance. I shall now briefly consider the point at which official discussions in the Netherlands have arrived.

The Dutch government ratified the ILO Convention on Paid Educational Leave No. 140 on 14th September, 1976. One year later, in September 1977, at the request of the Minister of Social Affairs and of several

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of his colleagues, a Committee on Paid Educational Leave within the framework of the tripartite Social-Economic Council was installed. In October 1978, this Committee presented to the government a unanimous first report in which it set out the general lines to which the introduction into Dutch society of paid educational leave should conform. The tripartite Committee continues its work in order to examine certain issues in more detail, including that of finance: At the time of writing, the government's reaction to the first report is not yet known, but it can be expected that the Committee's report will be endorsed in broad outline. It is therefore of interest to compare that broad outline with the views presented in previous sections of this paper.

From the outset, the Committee on Paid Educational Leave (from here on to be referred to as the "Committee") has given a broader interpretation to its mandate than can be found in the ILO Convention 140, in which paid educational leave refers only to leave granted to a worker in order to enable him to be absent from the working place during a given period of time in order to benefit from schooling and/or training. The Committee considered that, since the Convention had been accepted in Geneva in 1974, quite a few things had changed in Dutch society in particular and in the industrialized countries in general which, as it were, imposed the necessity to look at the target population in a broader manner. The following are some of the considerations that guided the Committee to this conclusion:

- (i) the fact that the unemployment problem has become more serious since 1974;
- (ii) the low participation in the labour force of women in the Netherlands as compared to surrounding countries;
- (iii) an increased demand for adult education, suggesting that many groups in the Dutch population who missed the educational boat earlier in their lives, now want another chance;
- (iv) the discovery that a significant percentage of the Dutch population can neither read nor write, in spite of compulsory education;

(v) during the last few years the Netherlands has been confronted increasingly with the problem of minority groups in the population, while the phenomenon of migrant workers seem to have become a permanent feature.

Looking at these considerations in their totality, one is unavoidably led to the conclusion that it would not be justifiable to distinguish between the working population on the one hand, and the rest of Dutch society on the other.

Hence, the Committee's declaration that paid educational leave must, as a matter of principle, benefit all groups of the population and cover all educational facilities. Moreover, the Committee has stated that this broad approach must be obvious right from the start. In other words, in the initial phase of the introduction of paid educational leave, the target groups should include not only workers, but also other categories who will be given first priority to benefit from such leave. The Committee has explicitly stated that the entire Dutch population must eventually be able to benefit. It is understandable that this ultimate goal cannot be reached overnight. Therefore, the Committee has had to indicate how it intends to make a start. As we have already implied, paid educational leave in the Netherlands will be phased by identifying target groups rather than by limiting its duration to insignificant proportions, or by selecting only some educational facilities.

In other words, the Committee wants to start with a few groups of the population, but wants to give these groups periods of paid educational leave of a meaningful duration, which can be spent in schools of their own unrestricted choice.

The first and main criterion established by the Committee for selecting these target groups is that the educational gap between population categories should not be increased. This implies that positive discrimination is necessary. If such precautions are not taken, a well known phenomenon is bound to occur, namely, that those who recognize the benefits of the additional facilities and are ready to take advantage of them, as a rule are those groups who already have better education and better incomes. These people have "learned

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to learn". It is this aspect which makes education a (self-) cumulating and reinforcing process for groups with better educational backgrounds. People with little education are more likely to regard anything new with apprehension and even distrust: not because they are not interested, but usually because they do not immediately recognize what it holds for them. It is this that gives the impression that they are less interested than those with a better education.

The fact that the Committee decided to use the level of education and income as its main criterion (entailing that people with low education and income levels will be the first to be presented with the possibilities of paid educational leave), means that a campaign must be started to inform and stimulate these target groups.

I believe that the Committee's reasoning process has shown that people do learn from experience and from social research. I am therefore very happy that target groups have been selected according to the 'positive discrimination' criterion.

The second main criterion that was used in selecting the target groups of the first phase of paid educational leave has been mentioned earlier; namely, the necessity to select a broad sample of population groups and not only workers. The more detailed results of this selection process and the five target groups that were ultimately chosen are snown in Table 2.

Turning now to the aspect of financing paid educational leave, the Committee almost automatically reached the conclusion that the main source of finance had to be government funds. Why? Because of the broad and representative selection of societal groups. If workers only had been selected, it would have been natural to discuss at length whether employers should pay, or at least should make a significant contribution. In the Netherlands, however, as Table 2 shows, there are significant target groups who are not in the labour force. The only way to make a start with educational leave and to ensure that this will be the beginning of a continuous and sustained movement, is to make the financing independent of sources that cannot be considered as being always available at the required levels.

Table 2
Target groups for initial phase of paid edicational leave

		Categories	So	
Target groups	Workers	Self-employed	Social Security beneficiaries	Other
I. Lowest education (secondary modern or lower technical school at most) Including women	Lowest educated, incl. migrant wor- kers and elderly workers in pre- pensioning-off phase	Lowest educated self-employed, people in agri-/ horticultural and middle classes (mostly small shopkeepers and tradespeople)	•	Lowest educated without wage- losses and non- social security beneficiaries
II. Long term unemployed and unfit for work (incl. women)		Social Security category I	Social Security categories, I, II and III	
III. Women			Social Security category III	- in their households, or - helping in their own (or husbands') shops
<pre>IV. Threatened by unemployment</pre>	In enterprises confronted by merger, rationalization or closing-down	In enterprises confronted by merger, rationalization or closing-down		
V. Other	•			

\* ca. manip 1

Having made that general point clear, the Committee declared itself to be in favour of using social security funds in order to facilitate procedures in times of great pressure on the public budget.

It is true that the Committee has done so prudently by emphasizing the fact that target group II (see Table 2) should be allowed to use its income out of social security funds to take up educational leave. In other words, it is not the much more daring approach put forward in section 3 of this paper. However, it is interesting to take note of the reaction of the Dutch Social Security Council to questions put before it by the Committee on Paid Educational Leave.

The main observations of the Social Security Council regarding the use that may be made of its funds for purposes of educational leave are the following:

- 1. If participation in educational leave is consistent with the compulsion that unemployed have to get back to work as soon as possible, it can be maintained that educational leave contributes to shortening the period of their dependency on unemployment-insurance payments in the longer term. In such circumstances, educational leave would therefore be fully consistent with the goals of the Council's funds. In other words, if reinsertion into the labour market is the prime motive for educational leave, there is no problem whatsoever in using social security funds.
- 2. In general, educational leave could be financed through social security funds: (a) by stating that a person is entitled to such an income during the period of his educational leave; (b) by making the social security funds grant him a subsidy.

Concerning the first of these positions, it should be borne in mind that when we are faced with educational leave <u>during regular</u> employment, present legal constraints are such that social security funds are not automatically available. The Social Security Council however, has made a point of stating that possibilities <u>do</u> exist in

principle, even within the present legal framework, but that a special case must be made for each individual.

With respect to the second position a new piece of legislation must be introduced for this to become a realistic proposition.

It seemed to me to be important to report this initial reaction by the Social Security Council in that it is evidently willing to take considerable steps in the direction indicated in Section 3 above, and is in fact already going rather further than the recommendation made by the Committee on Paid Educational Leave.

### 6. Concluding remarks

1. What has been proposed in this raper amounts to profound changes in the social and cultural domains of society with a view to achieving a better balance between remunerative work and other aspects of human life. If these changes can be brought about, the employment problem could also largely be solved.

In the face of lower rates of economic growth and continuing upward trends in technology and labour productivity, we must move from a defensive to a constructive attitude.

- 2. The proposed policy package combines a progressive policy with restoration to the individual of a maximum of initiatives.
- 3. It has been shown that the proposed changes can be financed from existing public funds by changing their purpose and destination.
  Only few, if any, additional funds will be required.
- 4. The proposed changes will be equitable, partly because of the built-in positive-discriminatory component! Equality of educational opportunities for everyone will be boosted and income distribution will consequently become less skewed. Weaker groups in society, who are now becoming more and more vulnerable, will become stronger as they are given additional opportunities to return to education and other forms of self-deployment.

5. The proposed measures will also be <u>efficient</u> because they will boost labour productivity and improve the working climate. They will also increase the flexibility of the labour market and facilitate adjustments to technological changes.

Datum 1983-03-01 Er ref

Director Ian Morrisson
Canadian association for adult education
29 Prince Arthur Avenue
Toronto M5R 1B2
CANADA

MAR 7 1000

Dear Ian,

I thank you very much for your letter of february 8 and I'm sorry that I have not answered you before. Today is my first day at work after more than two weeks absence for some kind of heart-disease.

I hereby send you the material we have in english.

If it's not to late please tell us if you need more information.

I belive most of the information had to be in english. Mr. Peter Hammarberg was our representative during the conference in Berlin 1979 on the same theme. I will now write him a letter asking if he can give you an actual information.

With kind regards

FOLKBILDNINGSFÖRBUNDET

Ralph / Úddman

Encl.

ACT CONCERNING AN EMPLOYEE'S RIGHT TO EDUCATIONAL LEAVE

Hereby the following is enacted:

An employee in public or private service who wants to undergo education shall have the right to necessary time off from his employment under the provisions of this Act.

If provisions have been made by statute differing from this Act, those provisions shall apply. As regards time off, differing provisions can be made in other statute than law if they concern an employee whose employment benefits are established in collaboration with the Government or an authority decided by the Government or an employee in the Swedish Parliament or its departments.

An agreement implying that an employee's rights in accordance with this Act will be restricted is not valid in that part.

Notwithstanding the provisions of the first paragraph deviations may be made from § 3, § 4, para 3, § 5 and 7, and § 10, para 2 and 3, on the basis of a collective agreement which has been concluded or approved on the employee side by a union which is to be considered as a national union under the provisions of the Act concerning the Right of Association and the Right of Collective Bargaining (1936:506

An employer who is bound by a collective agreement as referre to in the second paragraph may apply the agreement also to employees who are not members of the contracting union on the employee side provided the employee is engaged in work covered by the agreement and is not bound by any other applicable collective agreement.

§ 3 Right to time off falls to an employee who at the beginning of the time off has been in the service of the employer during the last six months or for a total period of at least twelve months during the last two years.

An employee who wants to take part in education which in essential parts concerns trade-union matters or matters connected with trade-union activity, has the right to time off even if he has not reached the period of employment as stipulated in the first paragraph.

In determining the period of employment according to the first paragraph the period during which the employee has been in the employment of another company within a group to which the employer belongs shall be counted. If an enterprise or part of an enterprise has been transferred to a new employer, the period during which the employee has been in the service of the former employer or with a company within a group to which the former employer belonged, shall be taken into account in the determination of the period of employment with the new employer.

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An employer has the right to defer time off to a later date than requested by the employee in accordance with what is stated in §§ 5-7.

If the employer wishes to defer the time off, he shall inform the employee about the postponement immediately and of the reasons for it.

If the employer is or usually is bound by a collective agreement in respect of the category to which the employee belongs, notification of the postponement shall be given immediately besides to the employee also to the local trade union concerned. The trade union has the right to call for - within one week after notification has been given - discussion with the employer concerning the postponement.

If the employer is or usually is bound by a collective agreement in respect of the category to which the employee belongs, and if he wants the time off to start later than six months after the request by the employee, consent to the respite is required by the local trade union concerned or, in case the matter is referred to central negotiations, by the national union concerned on the employee side.

In respect of time off the total of which corresponds to maximum one working week, consent as referred to in the first paragraph is required as soon as the respite requested by the employer is longer than two weeks. The same shall apply in respect of time off as referred to in § 3, para 2.

What has been said here shall also apply if an enterprise or part of an enterprise has been transferred to a new employer.

§ 6
If an employee has not been allowed to start his time off within two years after the request was made, he has the right to call for consideration by a Court.

Consideration as referred to in the first paragraph may be called for after one year has elapsed after the employee's request, if the total time off corresponds to maximum one working week.

What has been said here shall also apply if company or part of a company has been transferred to a new employer.

For consideration in accordance with § 6 due regard shall be paid both to the employee's wishes and to the interest in having the activity with the employer continue without any serious interruptions.

In case it is impossible to let several employees have time off simultaneously, he who wants to take part in education as referred to in § 3, para 2, shall have priority. In the second place priority shall be given to an employee who has not got education corresponding to nine-year elementary school and, next between them, he who has inconvenient working hours.

Consideration in accordance with the second paragraph shall take place within each collective agreement area individually.

If notice of dismissal is given or dismissal takes place only for the reason that the employee claims or makes use of his right to time off, the measure shall at the instance of the employee be declared invalid. In such a case §§ 34 - 37 and 39 and § 41, para 1 and 2 of the Act concerning Job Security (1974:12) shall apply.

An employee who has enjoyed time off shall, when he returns to work, be guaranteed the same or an equivalent position in respect of working conditions and employment terms as if he had not had any time off.

The further meaning of the first paragraph will have to be clarified by a collective agreement as referred to in § 2, para 2. Then § 2, para 3, shall apply correspondingly.

§ 10 An employee who breaks off his education has the right to go back to work.

If an employee wishes to make use of the right to which he is entitled in accordance with the first paragraph, he shall inform the employer that he wants to go back. The employer is not however obliged to let the employee go back earlier than two weeks, or, if the time off has lasted for at least 1 year, one month after he received the information. If the employer wishes to use his right to defer the return, he shall immediately advise the employee accordingly at the same time stating when the return can take place.

The second paragraph shall not apply in respect of time off which in all corresponds to maximum one week.

If the employer is or usually is bound by a collective agreement in respect of the category to which the employee belongs and if there arises a dispute on the application of this act or concerning a collective agreement stipulation which, on the basis of § 2, para 2, has superseded § 3, § 4, para 3, § 5, § 7 or § 10, para 2 and 3, or as referred to in § 9, para 2, the opinion of the local trade union concerning the proper purport of the act or the collective agreement shall apply until the dispute has been finally considered in court.

By a collective agreement now referred to it may be prescribed that the local trade union's right in accordance with the first paragraph shall instead belong to the national union.

If several trade unions are or usually are bound by collective agreements in respect of the category to which the employee belongs and if the unions cannot agree on a decision in accordance with §§ 5 or 11, the opinion held by a union or unions with together more than four fifths of the number of employees bound by collective agreements on the work place within the category concerned shall apply. If such a majority is not reached, the right due to a union in accordance with the section of the Act stated is no longer valid.

The first paragraph does not apply, in case the trade unions by collective agreements have agreed otherwise with the employer.

If an employer neglects his duties under this Act, or according to collective agreements which on the basis or § 2, para 2, have superseded § 3, § 4, para 3, § 5, § 7 or § 10, para 2 and 3, or as referred to in § 9, para 2, he shall pay, besides wages and other employment benefits to which the employee may be entitled, compensation for damage occurred. In determining if and to what extent damage has occurred, regard shall be paid also to the trade union's interests in the regulations of the Act being observed in relation to the members of the union and to other circumstances than such of pure economic importance. Compensation for damage referring to the time after the ceasing of the employment is determined at most to an amount as referred to in § 39 of the Act concerning Job Security (1974:12).

It may be imposed upon a trade union to pay damages in case, in making use of the right belonging to the trade union according to § 11, the trade union has caused misapplication of the Act or of collective agreement as referred to in the first paragraph and the union thereby has realized or obviously should have realized the mistake.

If reasonable in view of the size of the damage or other circumstances, the amount for damage may be adjusted.

#### \$ 14

He who wants to claim damages under the provisions of § 13 shall inform the counter-party of his claim within four month after the damage has occurred. If within that period negotia tion has been called for concerning the claim under the provisions of the Act concerning the Right of Association and the Right of Collective Bargaining (1936:506) or on the basis of collective agreement, an appeal shall be lodged within four months after the negotiation was terminated. Otherwise an appeal shall be lodged within eight months after the damage occurred.

The first paragraph applies correspondingly in respect of claims for pay and other employment benefits as referred to in § 13, para 1.

In case what is stipulated in the first and second paragraph: is not observed, an appeal may no longer be lodged.

Cases on the application of this Act shall be considered in accordance with the Act concerning legal procedures regarding labour disputes (1974:371). The same shall apply to statute as referred to in § 1, para 2, unless the statute contains other rules concerning right to appeal.

Notwithstanding the provisions of § 11 a court can give a provional ruling in the dispute matter for the period until the dispute has been finally considered in court. A demand for such ruling should not be granted unless the opposite party has been given opportunity to make a statement.

This Act shall come into force on January 1, 1975.

The Act shall not apply to time off for which application has been made before the coming into force.

Collective agreements, as referred to in § 2, para 2, § 9, para 2, and § 12, para 2, can be made before the coming inteforce of this Act.

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Draft Bill concerning the right of employees to educational leave

It is hereby ordained as follows.

§ 1. Employees in public or private service, who wish to obtain education, have the right to the necessary leave from their employment pursuant to this Act.

Rules of law which are at variance with this Act shall apply. With respect to the timing of leave, deviant regulations may be incorporated in some other statutory form than an Act if they concern employees whose remuneration is fixed with the participation of the Government or a government agency, or employees of Parliament or its agencies.

§ 2. Agreements which limit the rights of employees under this Act shall be invalid in this respect.

Notwithstanding the first paragraph of this section, departures from §§ 3 and 5 may be made by collective agreement, to be concluded or approved on the part of employees by an organization which is to be regarded as a head organization according to the provisions of the Collective Bargaining Act (1936:506).

An employer tied or customarily tied by a collective agreement of the type referred to in the second paragraph of this section may apply the agreement to employees even if they are not members of the employee organization concluding the agreement and are not subject to some other applicable collective agreement.

§ 3. The right to leave belongs to employees who, at the time when the leave starts, have been engaged by the employer for the past six months or for at least twelve months during the past two years.

Employees wishing to take part in a course arranged by an employee organization and dualing obsertially with education in trade-union or associated activities have the right to leave even if they do not fulfill the conditions in the first paragraph above.

The duration of employment is to be determined in accordance with § 4 of the Act on Security of Employment (1974:12).

- § 4. The leave should be arranged with due consideration to the exmployee's wishes as well as to the desirability of not seriously disturbing the employer's operations.
- § 5. An employer tied or customarily tied by collective agreement in relation to the category represented by the employee and who wishes to postpone the leave requested by the latter is to give notice of such postponement and the reason for it to the employee without delay. Such notice shall be given at the same time to the local employee organization with wich the employer is or is customarily tied by collective agreement with respect to the category represented by the employee. The employee organization has the right, within one week of receiving such notice, to call for discussions in the matter with the employer.

If the employer wishes the leave to start more than six months after the employee's request, the postponement must be approved by the employee organization mentioned in the first paragraph of this section or, if the question is referred by any of the parties to central negotiations, by the competent head organization on the employee's side.

In the case of leave for not more than 40 hours all told, approval is required as stated in the second paragraph above as soon as the postponement desired by the employer exceeds two weeks. The same applies to leave for taking part in courses as provided for in the second paragraph of § 3.

§ 6. If leave has been postponed without the employee's approval for pare-than the years, the employee shall be anti-lel irrespective of § 5 to have the question of its timing considered as provided for in § 12.

§ 7. If it becomes necessary to decide the order in which several employees are to obtain leave, employees wishing to take part in courses as stipulated in the second paragraph of § 3 should be given priority. In the second place, employees whose education does not amount to the nine-year compulsory school should have priority. Otherwise priority should be based on the length of employment.

A separate order of priority should be established for each area covered by a collective agreement if the employee organizations stipulated in the second paragraph of § 5 so require.

§ 8. An employee may not be laid-off or discharged on the grounds that he requests or utilizes his right under this Act.

Lay-off or discharge in contravention of the first paragraph shall be declared null and void at the request of the employee. Disputes about the validity of a lay-off or discharge shall be subject to §§ 34-37, § 39 and the first and second paragraphs of § 41 in the Security of Employment Lot (1974:12).

§ 9. Employees enjoying leave under this Act are not obliged to endure a loss of the benefits associated with their employment to a greater extent than arises from the interruption of work. An employee's working conditions shall not suffer because he exercises his right to leave under this Act.

§ 10. In the event of a dispute over the interpretation of regulations in a collective agreement which, with the

support of the second paragraph of § 2, have been substituted for the second or third paragraph of § 5, the interpretation of the local employee organization shall apply until the dispute has been examined by the Labour Court or by arbitration. The collective agreement referred to here can stipulate that the right of decision of the employee's party shall lie instead with the head organization.

§ 11. An employer who disregards his obligations under this Act shall be liable to pay for damages incurred in addition to wages and other benefits of employment to which the employee may be entitled under the Act. The third and fourth paragraphs of § 38 and § 40 of the Security of Employment Act (1974:12) shall be correspondingly applicable here.

§ 12. Cases concerning the application of this Act shall be tried by the Labour Court. Such cases shall be dealt with in accordance with the Act on the legal procedure in labour disputes<sup>2</sup>.

This Act comes into force on 1 January 1975.

This Act comes into force on 1 July 1974.

# Government proposals for legislation on the right to educational leave

#### Introduction

In April 1974 the Swedish government published a memorandum and the draft for a bill on the right to leave of absence for educational purposes. A summary of the propsals is presented here together with the draft bill.

An inter-departmental group has been working on the propsals since 1973. They will be circulated for comments to a number of competent authorities and organizations. The Government intends to present a bill to Parliament in the autumn of 1974 and the law should come into force from 1 January 1975.

#### Summary of the propsals

In order to strengthen the part played in society by adult education, it is proposed in the memorandum that employees should have a statutory right to leave of absence in order to further their education. The background to the bill is that negotiations on this topic between the Employers' Confederation (SAF) on the one hand and the Confederation of Trade Unions (LO) and the Central Organization of Salaried Employees (TCO) on the other came to a deadlock in December 1972, whereupon LO and TCC made representations to the Government for legislation to regulate the basic conditions for the right of employees to educational leave.

The draft bill incorporated in the memorandum contains general provisions - it is concerned with matters of principle and it is assumed that details will be worked out by collective bargaining. It is proposed that the act will cover persons in public as well as private employment. It applies, moreover, to workplaces with many employees as well as to small enterprises.

The proposed law is peremptory, though it would be permissible to modify the rules governing the qualifying period and the timing of leave. This would be done in collective agreements, to be concluded or approved on behalf of employees by their head organization.

Everyemployee who, att the time when leave begins, has been engaged by the employer for the past six months or for a total of at least twelve months during the past two years, would have the right to the leave required for education.

There are no restrictions concerning the nature of the education, this being a matter for the employee to decide, but the proposals do not apply to self-instruction.

It is proposed that the duration of leave should not be regulated in law but there are detailed rules about when leave can be taken. Briefly, these propsals are as follows.

Leave should be arranged with due consideration to the enployee's wishes as well as to the desirability of not seriously
disturbing the employer's operations. The parties on the labour market are assumed to have a common interest in ensuring
that the employees' wishes concerning leave are met as far as
possible. By the same token they are assumed to have a common
interest in ensuring that the employer's operations are not
endangered by educational leave.

An employer bound by a collective agreement who wishes to postpone requested leave is to give notice of this without delay
to the employee and the competent local wage-earner organization. This organization has the right to discuss the matter
with the employer.

If the employer wishes to postpone the leave more than six months after the employee's request, this must be approved by the local wage-carner organization or, if one of the parties refers the matter to central negotiations, by the competent

head organization. In disputes over the application of the rules for postponement, the determinative interpretation shall be that of the employee party after six months have expired.

In the case of leave for a total of not more than 40 hours, this six-month period is reduced to two weeks. For short-term leave the determinative interpretation is thus that of the employee party after only a very short interval.

If the question arises of arranging leave for several employees, it is proposed that those with an education below that of the nine-year compulsory school should have priority. This serves to indicate that the system for educational leave should benefit primarily those with a short education. After this, priority should be based on length of employment.

In view of the major importance of trade-union education, it is proposed that this should receive priority in certain respects. There would be no qualifying period for the right to leave in order to attend trade-union courses. And in the case of short-term leave, the six-month postponement mentioned above is reduced to two weeks. If several employees' requests for leave conflict, priority should be accorded to participation in trade-union courses.

The proposals also include rules to do with security of employment for those exercising their right to leave. Other matters include the liability of employers who disregard their obligations under the law and the handling of disputes concerning its application.

It is emphasized in the memorandum that trade-union organizations should be enabled to supply information about adult education and undertake promotional activities at places of work. It is considered that the position of study organizers need not be regulated here because a general solution of the

chief qustions to do with the rights of employee representatives has been incorporated in another bill (1974:88). This deals, for instance, with the right of employee representatives to the necessary time off for their tasks and their right of admission to the workplace for this purpose.

The question of financing education is not resolved in the proposals , reference being made to the work of the Committee on Financial Aid to Adult Students (known as SVUX). It is considered that the proposals can be incorporated in the framework of an educational organization with much the same direction and structure as at present. It is proposed that the Act on the right of employees to educational leave should come into force on 1 January 1975.

<sup>1</sup> There is a system for state aid to students in Sweden whereby an individual is entitled to certain financial grants and loans for study purposes. Substantial improvements to the financial support for adult students are being prepared at present by two commissions of enquiry and their proposals are expected early in the autumn of 1974.

SWEDISH MINISTRY OF EDUCATION AND CULTURAL AFFAIRS

STATE STUDY ASSISTANCE

IN SWEDEN

### STATE STUDY ASSISTANCE IN SWEDEN

State study assistance in the form of 1) student aid or 2) study means is payable to students on lines of education which receive state support or are under state supervision.

1. STUDENT AID (as a rule payable for 9 months)

Students at upper secondary school level may receive student aid in the form of a student allowance plus increment and repayable study means. A study allowance is granted for an academic year or for the period of a course, in principle as from the quarter after that in which a student attains the age of 16 years, when the general child allowance ceases.

A study allowance is paid to all students and amounts to 188 kronor per month.

An income-tested increment is payable as from 17 years of age, the maximum amount being 105 kronor per month. A reduction of the allowance starts as from an assessed parents' income of 38 000 kronor per annum if the pupil is an only child, otherwise as from a higher income.

A means-tested increment may on exceptional ground be paid to an amount of maximum 175 kronor per month.

A board and lodging allowance of 260 kronor per month is payable in case the student has to live away from home to attend a school. The student who is entitled to this allowance is also entitled to free travels between school and home, usually four times/month.

A travel allowance of 115 - 300 kronor per month is payable if the travel distance between home and school is at least 6 km.

The rules apply to "younger pupils", ie.at most 19 years of age.

Repayable study means can be granted up to usually at most 5 000 kronor/year for "younger pupils".

2. STUDY MEANS (as a rule payable for periods from 15 days to 9 months).

Study means are payable to students in post-secondary education and to students aged 20 or older, who take up upper secondary education in folk high school, in the municipal and state adult education system etc.

Study means consists of a student allowance and repayable study means.

The student allowance amounts to 242 kronor/month.

The repayable study means are index-regulated and amount to maximum approx. 1 600 kronor/month for spring term 1978 and approx. 1 700 kronor/month for autumn term 1978 (calculated). Extra study means may also be paid on exceptional grounds.

Repayable child allowance is available if the student has the custody of children, at present 350 kronor/month for each child under 16 years of age.

Study means are based both on the students' educational merits and on his/her financial situation. They are repayable over a period of normally 20 - 25 years.

Study means may also be paid to those who study at least on halftime basis, in such case amounting to half that payable to a full-time student.

These systems are presently being reviewed by a government commission with a view i.a. to facilitate the introducation of recurrent education and promote a better social recruitment to education. In June 1977, the Commission, put forward a report that gave alternative development trends.

After the report has been circulated for comments, the commission will get additional terms of reference in order to work out a concrete proposal.

### 3. STUDY ASSISTANCE FOR ADULTS

From July 1, 1976 there is a specially advantageous state study assistance for adults aimed at compensating for loss of earnings incurred by educational leave. Since the resources are limited a selection among applicants must be made. Priority is given to those who are most in need for education and financial support. There are three forms of support:

- a) allowance per hour (for shorter courses, study circles) is payable for minimum 10 and maximum 70 hours during a twelvemonth period. The sum is 25 kronor! subject to taxation.
- b) allowance per day (for shorter courses at folk high schools) is payable for minimum 2 and maximum 10 days during a twelvemonth period. The subsidy consists of
  - an income allowance of 125 kronor/day which is supposed to compensate the loss of earnings. This sum is subject to taxation.
  - a board and lodging allowance of 125 kronor/day which is support to compensate the expenses travels, boarding and lodging during the course.
  - c) special study assistance for lengthy studies are payable for minimum 15 days full-time studies or 30 days part-time studies. There is no formal maximum time limit. Those grants are payable to those who have been gainfully employed for at least 4 years or who have nursed their own children (under 10 years of age) or relatives in need of special care. Military service also qualifies for grants. The special study assistance consists of two parts.

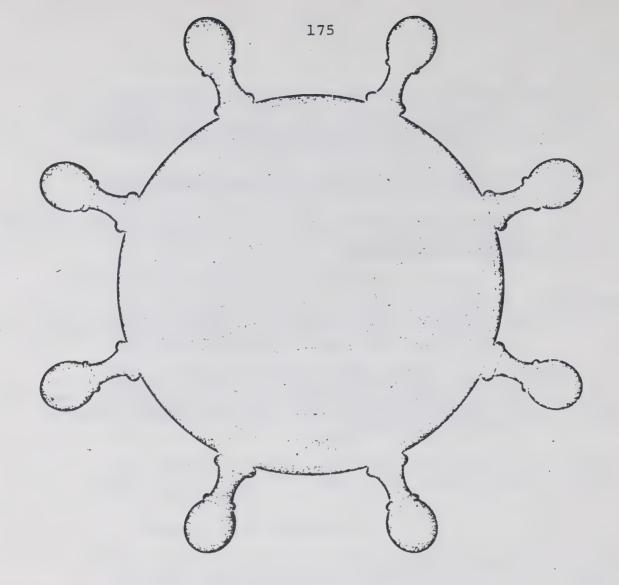
- Allowance (following the salary scale) amounting to minimum 1 625 kronor/month and maximum 1 995 kronor/month after taxation. (approximate figures)
- Repayable loan of about 660 788 kronor/month.

Those who have not been chosen for the kind of support described above, have the possibility to use the ordinary system of financial aid to students.

### 4. COMPENSATION PER HOUR FOR BASIC EDUCATION FOR ADULTS

In many places the local authority organizes adult education. The courses are open to adults who can not read or write or in some other way have a poor educational background.

If a person takes part in any of the courses he/she is entitled to a compensation of 25 kronor/hour (if the education means loss of earnings from daily work) or in other case 10 kronor/hour for maximum 28 hours/week.



# A SURVEY OF NATIONAL BENEFITS FOR STUDENTS



# Extended child allowance

If you attend elementary school, you will receive extended child allowance as from the quarter following your sixteenth birthday. This extended child allowance takes the place of basic child allowance, which then ceases to be paid. You can only receive extended child allowance while actually attending school, i.e. for up to nine months in the year. Pupils attending special schools for the mentally retarded or for children and young persons with vision. hearing and speech impairments can also receive extended child allowance.

The rate of extended child allowance is 208 kronor per month, irrespective of your parents' earnings.

You do not need to apply for the grant, but you do have to furnish various personal particulars by completing form 135, obtainable at your school.

	·
Fori	ns
No.	Name
45	Application for study assistance
46	Application for needs-tested supplement
47	Application for free travel home
49	Home journey certificate for residential student
50	Application for study assistance in connection with studies abroad
60	Application for hourly compensation, basic adul education
67	Application for extra loan and grant
75	Particulars concerning studies abroad
84	Application for refund of travel expenses
92	Application for special study assistance for Swedish students domiciled abroad
134	Application for extended child allowance in connection with studies abroad
135	Personal particulars for disbursement of extended child allowance
145	Personal particulars: non-Swedish citizens
150	Specification of studies. Annex to application fo national study assistance relating to participation in municipal adult education
65	Application for repayable study assistance (study assistance for young students)
201	Application for student loan and grant (mature students and certain young adult students at upper secondary level)
203	Study assurance/certificate
210	Statement by headmaster/principal
501	Application for student benefit-special adult study
,01	assistance
603	Study assurance/certificate-special adult study

Application for study benefit-Hourly study assistance/Daily study assistance (individual applica-

Application for student benefit-Hourly study assistance/Daily study assistance (collective applica-

Application for State grant-outreach activities



# Study assistance

You can obtain study assistance if you satisfy the following conditions.

- You must not be over 19 during the calendar year in which the academic year or course begins.
- You must be engaged in upper secondary education, i.e. upper secondary school (except for certain special courses entitling students to loans and grants1), folk high school, municipal and national adult education at elementary school or upper secondary school level, and certain other forms of education at upper secondary level.
- You must be studying full time.
- The academic year or course must last for at least eight weeks.
- 1) Concerning loans and grants, see page 4.

# How to apply for study assistance

It is up to you to apply for study assistance. If you are still a minor, however, the application must be made out by your parents. Hand in your application at the school you are attending. The necessary application forms are obtainable there as well. The sooner you hand in your application, the sooner the money will come through

You cannot expect to receive any money if you apply after the academic year or your course has ended.

Special application periods apply concerning free journeys home and repayable study assistance; see next page.

# What is study assistance made up of?

The figures in this table refer to the academic year 1979/ 80. Payments are normally raised at the beginning of each new academic year.

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Study grant	208/month
Travel supplement	130–325 kr/month for journeys of at least 6 km
Boarding supplement	285 kr/menth
Free journeys home for residential students	Four journeys home per month if the distance does not exceed 250 km. Otherwise two journeys home per month.
Income-tested supplement	125 kr/month
Needs-tested supplement	Up to 200 kr/month
Repayable study assistance	Up to 16 470 kronor for an academic year of 9 months Up to 15 000 kronor per 9-month academic year for students aged 16–17 years
Special study assistance for Swedish students domiciled abroad	Between 1 000 and 5 000 kr/ academic year
Refund of travel expenses (for students attending State schools for adults)	Payments corresponding to actual fare to the town or city concerned

# Study grants

Study grants can be awarded as from the first quarter after your sixteenth birthday, and they replace the basic family allowance, which ceases to be paid at this point. You will receive a study grant irrespective of your own financial circumstances or those of your parents. The grant will only be paid while the academic year or course is actually in progress.

# Travel supplement

If you have at least 6 km to travel between home and school, you can obtain a travel supplement as per the following table.

Journey, 46	in	km,	at least	6	13	19	27	36	
Max. trave ment. kr/r				165	210	250	290	325	Mai Mar . 18.8.

If your monthly travel expenses can be reduced by means of a season ticket or a special student ticket, your travel supplement will correspond to your actual monthly expenses.

Travel supplements are never obtainable simultaneously with boarding supplements.

# **Boarding supplement**

You can obtain a boarding supplement if you are obliged to find lodgings in the town or city where you are studying because of the length or inconvenience of the journey from your home. In exceptional cases you can obtain a boarding supplement for lodgings in your home community, but there must be powerful reasons of social welfare to justify this. As a rule you will not be able to obtain a boarding supplement for studies away from home if the same course of studies can be attended in your home community.

Boarding supplements are never obtainable simultaneously with travel supplements.

### Free journeys home for residential students

If you are entitled to a boarding supplement, then in principle you are also entitled to free journeys home. If so, you will as a rule be issued with what is called a home travel ticket (hemresekort). This ticket will entitle you to travel free of charge by bus or train between the town or city where you are studying and your home community. If public transport is limited or non-existent, you can obtain a flat rate cash refund instead of a home travel ticket. The size of this refund will depend on the distance between your home and the place where you are studying.

Applications for free journeys home must be submitted not more than three weeks after the beginning of the academic year or course. If you apply later than this, you will only be able to obtain free journeys home from the date of your application.

### Income-tested supplement

An income-tested supplement is obtainable as from the month following your seventeenth birthday. Applications for income-tested supplements are considered in relation to an economic base (ekonomiskt underlag) relating to your own assessed income and wealth together with your parents'. If you are married (or deemed to be married), your parents' income and wealth will be disregarded, but your husband's or wife's income and wealth will be taken into account instead.

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If you are unmarried and have no brothers or sisters, or if you are married, you will be awarded an income-tested supplement if the economic base does not exceed 46 000 kronor. If you have brothers and sisters, a higher economic base is permissible.

# **Needs-tested supplement**

There are two conditions which you have to satisfy in order to qualify for a needs-tested supplement.

- The economic base (see "income-tested supplement")
  must not exceed 45 000 kronor (this increased limit will
  take effect on 1st July 1979, subject to Riksdag approval)
- You must be in particularly grave need of additional study assistance.

When your application is considered, your current economic circumstances and those of your parents (or your husband/wife if you are married) in terms of income and wealth, various social benefits etc. will be taken into account.

### Repayable study assistance

Repayable study assistance is obtainable as from the quarter following your sixteenth birthday.

If you are 16–17 years old, your entitlement to repayable study assistance will depend on your own financial circumstances and those of your parents. If your assessed economic resources ("economic base") do not total more than 50 000 kronor, you may borrow up to 5 000 kronor for an academic year of nine months.

If you are 18–19 years old and are not economically independent of your parents, you may borrow up to 10 000 kronor for an academic year of nine months. Here again, the amount you can borrow will depend on your own economic circumstances and those of your parents. If your assessed economic resources ("economic base") total more than 50 000 kronor, your loan will be reduced.

Where married students (or students deemed to be married) are concerned, parental finances are disregarded in both the above cases, but the economic circumstances of the applicant's spouse will be taken into account instead. If you are 18-19 years old and financially independent of your parents, you may borrow up to 16 472 kronor for an academic year of nine months. The amount you are allowed to borrow will be reduced by the amount of your student grant and any supplementary benefits, together with the value of any school meals and teaching materials which you may receive free of charge. If you have child dependants you may borrow larger amounts in the form of child supplements; at present these supplements amount to 364 kronor per child per month. It is only your personal finances that influence your entitlement to repayable study assistance.

Applications for repayable study assistance are decided by the Central Study Assistance Committee in Sundsvall, but they have to be handed in at the school where you are studying.

Application periods are as follows.

- Applications for an autumn/academic year, by 31st October.
- Applications for a spring term, by 15th April.
- If course begins after 1st October or 15th March, applications may be submitted later, but on no account more than one month after a course has begun.

For conditions of repayment, see page 7.

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# Loans and grants

Who is entitled to loans and grants?

- Students at post-secondary level. This level includes university, college, seminas, schools of nursing and certain other courses of training.
- Upper secondary students aged twenty or over during the year in which the academic year or course begins.
   This includes upper secondary school and folk high school, municipal and national adult education (elementary school courses included) and other courses of training and studies.
- Upper secondary students aged twenty or over during the year in which the academic year or course begins.
   This includes upper secondary school and folk high school, municipal and national adult education and other courses of training and studies.

As a rule you have to be under 45, but in special cases persons over this age can also obtain loans and grants. This is applied, for example, if you begin to study before the age of 45 and expect to complete your studies within the not too distant future. It also appleis if you want to start a short-term vocational training course after the age of 45.

# How much do I get?

Loans and grants-studiemedel in Swedish-comprise a non-repayable grant plus a repayable child supplement and a (repayable) loan.

Loans and grants are indexed and are computed in relation to the base amount, as provided in the National Insurance Act. Loans and grants for the autumm term are geared to the base amount applying in May, while those for the spring term are geared to the base amount applying in November. If loans and grants are applied for a complete academic year (autumm and spring term) at once, the amount payable is computed in relation to the base amount in May, but a larger amount is paid for the spring term if the base amount rises by at least 400 kronor between May and November. The figures in our tables are geared to the base amount for May 1979, which was 13 100 kronor. Thus if the base amount goes up in June 1979, loans will go up as well. Grants, on the other hand – the non-repayable portion of studiemedel – remain unaltered.

You will receive loans and grants for every complete period of 15 days of study or training if you are a full-time student and every complete period of 30 days if you are studying part time.

Maximum payments, kr/month	Full-time studies	Haif-time studies
Student grant	242	121
Repayable ;	1796	898
Child supplement-repayable	364	364

On special grounds you can receive more money—extra study assistance—in order, for example, to cover particular expenses connected with your studies. Extra study assistance is repayable.

If you study at a national school for adults, you can be awarded compensation for your fares to and from the town

or city where the school is located. The table at the top of the next column shows the maximum earnings and wealth which you and your husband/wife are allowed before your loans and grants are reduced, and it also shows the stages by which reductions are made.

	Franchise		Reduction per
	Full-time studies	Half-time studies	studies during the calendar half-year
Studen's half-yearly income	. 7 205 kr¹	18 340 kr	1/9 of excess
Husband's/wite's	45 850 kr	51 090 kr	4/45 of excess
Student's wealth	78 600 kr	78 600 kr	2/45 of excess
Combined wealth (married student) <sup>2</sup>	117 900 kr	117 900 kr	2/45 of excess

Applies if studies last for 4 months or more per calendar halfyear. For shorter periods of study the franchise is higher, though not more than 9 825.
 If you apply for loans and grants for tow terms only have an income for half the calendar year, for computation purposes this income will be divided up between the two terms.

# Is there a stipulated rate of progress?

If you attend upper secondary school, you will receive loans and grants without any assessment being made of your study aptitude. If you are attending some other form of upper secondary education (e.g. municipal adult education, folk high school), you will receive an intitial loan and grant without any assessment being made of your study aptitude, but you will not receive any further payments unless you complete your initial studies at a normal speed.

When you enroll for post-secondary education for the first time, you will receive loans and grants without any assessment being made of your study aptitude. If you have studied previously at post-secondary level, you will always be asked to show the results of those studies irrespective of whether you are applying for loans and grants for the first time or have previously received loans and grants/ special adult study assistance. You will not receive any further loans or grants unless your initial studies proceed at a normal speed.

# Application periods

Apply for loans and grants well in advance.

Applications must reach the Study Assistance Committee by 31st October in the case of loans and grants for an autumm term/academic year and by 15th April in the case of loans and grants for a spring term/calendar year. If your course begins after 1st October or 15th March you can of course put in your application later.

### **Application forms**

Applications forms are obtainable from schools, study assistance committees and most banks.

# Disbursement of loans and grants

Loans and grants are paid for one term at a time. As from 1st July 1977, payments will be computerized. You will receive a study assistance cheque by post, and you will be able to cash it any bank or post office. Before this, however, you must have sent in a study assurance showing that you are taking part in the course of studies for which you have been awarded a loan and a grant.

<sup>2)</sup> Unmarried couples living together, who have previously been married, have previously lived together, or have had children together, are treated as husband and wife.



# Student benefit

Student benefit is a particularly advantageous form of study assistance which is principally intended to make up for any loss of earnings which you may incur by taking time off from your job in order to study. There is a limit to the financial resources available for student benefit payments, and so some of the people who are formally entitled to this benefit will not in fact be able to receive it. A selection of applicants will be made with reference, among other things, to previous education, difficulties involved by spare time studies, a particularly large number of dependants and so on.

Student benefit can be awarded in the form of

- Special adult study assistance—for at least 15 days' full-time studies or at least 30 days' part-time studies (not less than half-time)
- daily study assistance—for up to 12 days per year
- hourly study assistance—for up to 90 hours per year.

# Who is entitled to special adult study assistance?

You can receive special adult assistance for studies at elementary school and upper secondary school level, e.g. municipal and national adult education, folk high school and upper secondary school. Where post-secondary studies are concerned, only vocational higher education (YTH) at present qualifies for special adult study assistance.

For at least 4 years you must have

- been gainfully employed or had your own business, e.g. a farm<sup>1</sup>, or
- · Looked after a child of your own aged under ten, or
- · Looked after a person in need of special care, or
- worked on a farm owned or run by your husband/wife, or
- worked in a business run by your husband/wife.

If you have done at least six months' military service or non-combattant service during any year, this counts as a full year's gainful employment.

You will also be credited with any period during which you have been prevented from working by illness or disability.

If you satisfy the requirement of four years' gainful employment (or its counterpart), you will have a chance of obtaining special adult study assistance, but you must be prepared for the possibility of another applicant being selected before you.

1) You must have been gainfully employed to a sufficient extent to qualify for ATP pension points.

# How much do I get?

Special adult study assistance comprises

- a taxable grant and
- a repayable amount (repayable study assistance).

79 If you wish, you can apply for the grant only.

On page 7 you can read about the rules concerning the repayment of the loan portion.

If you are studying full-time, you will receive for each month an amount (grant + loan) after tax equalling that which you would have received if you had been awarded a training allowance (otherwise known as an AMS grant). If you are a part-time student, you will receive in the course of a month half the amount paid to full-time students.

Payments, kr/month	Minimum Maximum
Grant (before tax) Repayable part	2 360 approx. 2 932 approx. 776 appro. 853 approx.
Total	3 136 approx. 3 785 approx.

You will receive the minimum payment if you do not belong to an approved unemployment insurance fund. If you do belong to one, you can obtain a larger amount. The actual payment you receive will then depend on the per diem benefit rate fixed by your unemployment insurance fund. The maximum obtainable is 3 785 kronor per month.

The repayable portion is tax free. If you are studying at a State school for adults, you can also obtain compensation for your fares to the town where the school is situated.

# Stipulated progress

If you attend upper secondary school, you will receive special adult study assistance without any assessment being made of your study aptitude. If you enroll for some other type of upper secondary education (e.g. municipal adult education or folk high school), the first payment of special adult study assistance will be made without any assessment of your study aptitude, but you will not receive any further payments unless your initial studies progress at a normal speed.

### Disbursement

Special adult study assistance is paid by public insurance offices at the end of each month. Before each payment falls due, you have to send the insurance office a form known as a study assurance/certificate, showing that you are attending the course of studies for which you have been awarded assistance.

# When to apply

There are four application periods every year.

•	pply not iter than
throughout the autumm term or for the whole of	
the autumm term and the whole of the spring term for the whole of the spring term or	n 15th May
for the whole of the spring and autumm terms lasting one or more months and starting	15th October
during the first quarter	15th October
the second quarter	15th February
the third quarter	15th May
the fourth quarter	15th August

For the application periods ending in October and May respectively, the available money will be divided between applicants who are going to study for the whole of the coming term or for the next two terms.

If you are going to study at elementary school or upper secondary school level, you must send your application to the Adult Education Committee of the county in which you live. If you are going to follow a course of higher vocational studies (YTH), you must send your application to the Study Assistance Committee. Addresses; see page 8.

### Dany study assistance

Daily study assistance is available for a course of subject studies lasting a few days at folk high school.

This assistance is payable for up to ten days' studies per year. It is payable for an extra two days – up to twelve days per year, in other words – if you lose earnings or incur significant expense on days spent travelling to and from school.

This form of assistance comprises

- an income allowance—compensation for loss of earnings if you take time off from work (only payable to gainfully employed persons)
- a boarding allowance—compensation for fares, board and lodging during the course.

The income allowance is 150 kronor per day and is taxable. The boarding allowance, which is tax free, is also 150 per day.

# Hourly study assistance

You can obtain hourly study assistance to enable you to take part in a study circle in Swedish, English, mathematics, civics, or trade union affairs, home language courses for immigrants or special courses for the handicapped. If the study circle is not available in your home community, you can obtain hourly study assistance for the corresponding course of studies in municipal adult education.

Hourly study assistance is payable at a rate of 30 kronor for every hour of studies which involves you in loss of earnings. This money is taxable.

This assistance is payable for up to 70 hours' studies per year. It is payable for an extra 20 hours – making up to 900 hours altogether – if you lose earnings in connection with travel to and/or from the place where the course is held. Travelling time compensation, however, is not obtainable for more than two hours per spell of studies.

# Applications-hourly study assistance, daily study assistance

An application can be made by your trade union (collectively), or else you can apply individually on your own behalf.

There are four application dates per year: 15th Oct., 15th Feb., 15th May, 15th Aug.

Each application must refer to studies during the quarter immediately following.

### Information, forms

If you have any questions of if you need help in completing your application, you can consult the educational organizer at your place of employment or some other officer in your trade union. You can also get in touch with the Adult Education Committee in your county.

The educational organizer should also be able to supply you with application forms. Otherwise forms are obtainable from the Adult Education Committee, a public insurance office or the Employment Service.

# Hourly benefit for adults attending courses of basic education

In many places municipal authorities organize special courses for adults who are unable to read, write or calculate or have a very poor command of these skills. If you take part in courses of this kind, you can receive benefit at the following rates:

- Su knonor per hour it you suffer loss of earnings (or their counterpart)
- 12 kronor per hour if you do not suffer any loss of earnings but are over 20 years of age.

Hourly benefit is obtainable for up to 28 hours per week. Altogether you can receive benefit for up to 2 220 hours. This type of benefit is taxable.

Applications have to be submitted to your local education authority, which can also supply you with further particulars.

# Studies abroad

If you are a Swedish subject, you are entitled on certain conditions to extended child allowance, study assistance or loans and grants to enable you to study abroad.

**Extended child allowance** is obtainable for studies at a Swedish school abroad.

Study assistance can be awarded if you are domiciled abroad together with your parents or if you are taking a clearly vocational course of studies which has no counterpart in Sweden. These conditions, however, do not have to be met in the case of studies in another Nordic country if the educational establishment attended is state—supervised and the course of training or education involves at least four months' full-time studies.

Loans and grants can be awarded for courses of training or education which are not available in Sweden and which are judged to be of value. Loans and grants are also obtainable for certain courses in other countries whose counterparts in Sweden are subject to intake restrictions. At present this applies to medical studies and to training courses for physiotherapists, occupational therapists, orthoptists, dentists, dental hygienists and dental technicities.

orthoptists, dentists, dental hygienists and dental technicians. One stipulation, however, is that there must be a shortage in Sweden of practitioners of the profession concerned.

These conditions do not have to be met concerning studies

in another Nordic country if the training or education there is state-supervised. Extra study assistance, which is repayable, can be awarded to cover, for example, tuition fees, health insurance premiums and fares between your home area and the place where you study. Students' health insurance! does not apply to persons studying abroad. General regulations concerning the various forms of assistance are not studyed the appropriate headings.

tance are set out under the appropriate headings.

Applications for study assistance for studies abroad must be sent to the Foreign Section of CSN.

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# Training grant (AMS grant)

You can obtain a training grant (AMS grant) in certain cases if you are unemployed or in danger of unemployment. This grant is also payable to persons attending certain training courses for short-handed occupations. It is important to get in touch with the employment office before starting a training course. Call at your employment office for further details.

If you receive loans and grants, special adult study assistance or repayable study assistance, you will also have special health insurance coverage for the period of studies concerned. In order for this insurance to be valid, you must have applied for study assistance before you fell ill. You must also have studied for part of the term.

The insurance entitles you to collect study assistance even for a period of illness during your studies. If your illness continues beyond a 14-day waiting period, your debt on the relevant portion of your loan can be cancelled.

If you are taken ill while receiving special adult study assistance and at the same time receive sickness allowance, however, your adult student grant will be reduced by the

amount you receive in the form of sickness allowance.

The repayable portion is always disbursed at the full rate. It is therefore important to notify the public insurance office when you are taken ill. You must do this on the very first day of your illness, wherher you are classified for sickness benefit or not. At the same time you must tell the public insurance office whether or not you have applied for study assistance.

Students' health insurance is not available to persons studying abroad.

Information on health insurance is obtainable from public insurance offices, study assistance committees and adult education committees.

# Repayment of student loans

# How does the repayment system work?

- Two years without any repayment
- A long repayment period—generally about 20 years
- One or more years' respite if your payment capacity does not rise above a certain level
- · Cancellation of debts at age 65 and at death
- By special decision, cancellation in the event of illness or disability
- A certain bonus if you make voluntary payments during the same year(s) as you pay the fixed instalments.

# Two calendar years without any repayment

Repayment begins two years after your last receipt of a loan and grant.

You must then start paying off your debt and continue to do so every year until it is liquidated, even if you resume your studies and obtain fresh loans and grants. Thus the two-year respite can only be granted once.

### Repayment period

- If you are 36 or under when you start paying off your debt, you will continue with your payments up to and including the year of your fiftieth birthday.
- If you are between 36 and 51 when you start paying off your debt, you must complete the payments within 15 years.
- If you are 51 or over when you start paying off your debt, you must complete the payments in the year of your sixty-fifth birthday.
- If your debt is a small one, the repayment period allowed will be shorter.

Student loans are repaid by annual instalments. Particulars concerning these instalments are contained in a statement of account sent to you by the Central Study Assistance Committee (CSN) at the beginning of each February.

# Application for respite

You can apply for a respite concerning the payment of the annual instalment. If you are given a respite for one or more years, your repayment period will be correspondingly extended.

In order to apply for a respite, you must complete the special form accompanying your statement of account. A

separate application must be made for every year for which you require a respite.

You will not automatically be given a respite if you begin receiving study assistance again during the repayment period.

An application for a respite will be decided with regard to your own financial circumstances and those of your husband to your own financial circumstances and those of your husband or wife, and also according to whether or not you have custody of a child or children under ten.

### Cancellation of debts

Debts are cancelled at age 65 or at death. They can also be cancelled in the event of illness or disability, on condition that your work capacity is permanently impaired. Adult students with 4 years' job experience (or child care) who have received study assistance for both upper secondary and at least 4 terms' post-secondary studies can on certain conditions obtain cancellation of a certain portion of the students loans obtained for their upper secondary studies

# Voluntary repayment

If you wish to pay off your debt more rapidly than is normal, you can make voluntary payments. You will be credited with a bonus if you make voluntary payments during the same year(s) as instalments are demanded by the CSN. Voluntary payments during the repayment period do not affect the size of the instalments. Instead they shorten the repayment period.

# How are debts computed?

Your debt is computed by multiplying the debt brought forward from the previous year by what is known as an adjustment index. This index is fixed by the Government and now stands at 1.032, which means that your debt increases by 3.2 per cent per annum. The increase can be smaller than this if the consumer price index rises in the course of a year by a percentage which is lower than the adjustment index.

# How much do I declare in my income tax return?

Loan instalments are not deductible in your income tax return, but your debt at the end of the year can be entered as such in your declaration of wealth.

The repayable portions of all types of study assistance are repayable according to the same rules.



# If you are not a Swedish subject

If you are not a Swedish subject, you can obtain Swedish study assistance if you have come to Sweden to settle permanently.

The following are some of the rules applied in this assessment process.

- Study assistance will as a rule be awarded if you have been domiciled in Sweden and have been gainfully employed here at least half-time for two consecutive years and if you have had residence and labour permits throughout that period. Residence and labour permits are not stipulated in the case of citizens of the other Nordic countries.
- If you have been classified by the National Immigration and Naturalization Board (SIV) as a refugee or quasi-refugee, study assistance can be awarded without any stipulation concerning a period of employment.
- You will receive study assistance if you are under 20 years old and have come to this country with your parents and they are gainfully employed.

 If you do not come from a Nordic Country and have been married to and have cohabited with a Swedish subject for at least one year, you will generally receive study assistance provided that you have been accepted as an immigrant. If you are unmarried but living together with a person by whom you have a child, you will be treated as a married person.

If you are a citizen of Denmark, Finland, Iceland or Norway and cannot obtain Swedish study assistance, you should instead apply in your home country for study assistance for studies in another Nordic country.

Apply for study assistance well before the beginning of term. The handling procedure can take a long time.

# Bilingual teacher training

Persons accepted for two-year higher education for a teaching profession do not have to meet the requirement of two years' gainful employment.

You can only obtain study assistance if it is presumable that on completion of your training you will remain in Sweden in order to teach in the Swedish school system.

# Addresses of Study Assistance Committees

Göteborg Linköping Lund Stockholm Umeå Uppsala

Län: N, O, P, R, S Län: F, H, D, E, T Län: G, I, K, L, M Län: A, B

Län: Y. Z. AC, BD Län: C, U, W, X

Nya Allén 5 Tanneforsgatan 3 Box 1079 Box 6503 Box 144 Övre Slottsgatan 7

411 38 Göleborg 582 24 Linköping 221 04 Lund 113 83 Stockholm 901 04 Umeå 752 20 Uppsala

# Addresses of Adult Education Committees

Stockholms län Uppsala län Södermanlands län Östergötlands län Jönköpings län Kronobergs län Kalmar län Gotlands län Blekinge län Kristianstads län Malmöhus län Hallands län

Box 144 101 21 Stockholm Box 623 751 26 Uppsala Box 186 611 01 Nyköping Box 2001 Box\*556 Fack Box 827 Box 151 Box 25 Box 76 Box 6032 200 11 Malmo Box 208

035-11 75 70

Göteborgs och Bohus län Box 7141 402 32 Göteborg Alvsborgs län Skaraborgs län Värmlands län Örebro län Västmanlands län Kopparbergs län Gävleborgs län Västernorrlands län Jämtlands län Västerbottens län

Norrbottens län

Box 316 Fack 510 Fack Box 290 Box 316 Box 254 Box 705 Fack

Box 587

Box 424

501 05 Borás 531 01 Lidköping 651 01 Karlstad 701 04 Orebro 721 07 Västerås 791 01 Falun 801 28 Gävle 871 01 Härnösand 831 27 Östersund 901 09 Umeå Box 247 . 951 23 Luleå

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# STUDIEPENNING

# för längre studier "särskilt vuxenstudiestöd"

Den här blanketten ska du använda om du tänker studera under minst 15 dagar på heltid eller minst 30 dagar på deltid (minst halvtid) under ett kalenderhalvår. Ska du däremot studera under en kortare tid, t ex i en studiecirkel som pågår ett par timmar i veckan, ska du använda blanketten för timoch dagstudiestöd.

# VIKTIGT! Läs igenom detta innan du fyller i ansökan.

Handledningen på sidorna 2 och 3 är till för att hjälpa dig fylla i ansökan om studiepenning. Du får bl a tips på var du hittar de uppgifter du behöver. Har du några frågor som du inte får svar på här så kan du vända dig till den fackliga studieorganisatören på din arbetsplats eller till länets vuxenutbildningsnämnd. Adresserna till vuxenutbildningsnämnderna hittar du på sista sidan i blanketten

# Vilka studier kan du söka vuxenstudiestöd för?

Du kan söka särskilt vuxenstudiestöd för studier på grundskolenivå och gymnasial nivå, t ex inom kommunal vuxenutbildning eller folkhögskola. Bland högskoleutbildningar är det tills vidare endast s k yrkesteknisk högskoleutbildning (YTH) som berättigar till vuxenstudiestöd.

Studierna ska bedrivas på heltid eller minst halvtid.

# Vem kan få vuxenstudiestöd?

Du måste under minst 4 år ha

- förvärvsarbetat eller haft egen rörelse, t ex jordbruk (du måste ha förvärvsarbetat i sådan omfattning att du blivit berättigad till ATP-poäng) eller
- skött eget barn som inte fyllt tio år eller
- vårdat någon som varit i behov av särskild omvårdnad eller
- arbetat på jordbruksfastighet som ägs eller brukas av din make/maka eller
- arbetat i rörelse som drivs av din make/maka.

Även den tid då du varit förhindrad att arbeta på grund av sjukdom eller handikapp får tillgodoräknas

### Urval

Uppfyller du villkoret om fyra års förvärvsarbete (motsvarande) har du möjlighet att få särskilt vuxenstudiestöd. Men alla som söker stöd kan inte få det. Det beror på att antalet stöd är begränsat och att ett urval måste göras bland behöriga sökande.

Vid prövningen av ansökan tas hänsyn till bla

- kort tidigare utbildning
- antal år du förvärvsarbetat (jämför föregående avsnitt)
- svårigheter att bedriva studierna på fritid tex obekväm arbetstid, handikapp
- betungande försörjningsbörda

Det är fin stor konkurrens om stöden. Bara de som har mycket stort behov av utbildning och stöd kan därför komma i fråga. Erfarenheterna visar, att chansen att få stöd är liten för den som

- har mer än 8-årig grundutbildning (när det gäller stöd för studier på grundskolenivå)
- har mer än 9-årig grundutbildning (när det gäller stöd för studier på gymnasieskolenivå)
- har förvärvsarbetat mindre än 7−10 år
- är under 25 år

Är du dessutom ensamstående utan försörjningsplikt mot barn eller gift/sammanboende och maken/makan har goda inkomster, är utsikterna att få stöd mycket små.

Vid urvalsprövningen görs en individuell bedömning av varje sökande och då beaktas alla omständigheter av betydelse. Har du speciella skäl kan chansen till stöd därför vara ganska god, även om du tillhör någon av de grupper som, enligt vad ovan sagts, har liten chans. Det är i regel lättare att få stöd för en kort utbildning (högst två terminer) än för en lång utbildning.

Har du inte möjlighet att få särskilt vuxenstudiestöd kan du i stället ansöka om studiemedel som kan beviljas för samma utbildningar som det särskilda vuxenstudiestödet. Ansökan görs på blankett 201 som du kan få på skolan, vuxenutbildningsnämnden eller studiemedelsnämnden

### Företräde till fortsatt stöd

Den som en gång har fått särskilt vuxenstudiestöd för en viss utbildning har i regel rätt till fortsatt stöd för att fullfölja denna utbildning förutsatt att studierna går i normal takt. Däremot har den som tidi-

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# **(2)** Medborgarskap

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nämnden eller studiemedelsnämnden. Blankett 145 får du från skolan, vuxenutbildnings-

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# 4 Försäkringskassans kontorsnummer

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# G Arbetslöshetskassa

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# 0 Hela utbildningens längd

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# 0 Gift/sammanboende

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# 6 studietiden Förvärvsarbete under

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# 6 Bibehållen lön

ses lön som du får behålla (bibehållen lön) trots att du är ledig för studier, alltså inte lön som du får från din arbetsgivare under studietiden. Härmed avtivavtal eller annat skriftligt avtal uppbär Här ska du bl a ange ev lön som du enligt kollekför ev arbete som du utför även under studietiden (sådan lön redovisas på raden ovanför).

vuxenstudiestödet med belopp motsvarande lönen lings- eller praktiklön under utbildningen minskas Om du har bibehållen lön, permitteringslön, lär-

# Pension, livranta

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pension eller livränta som sökande uppbär Vuxenstudiestödet reduceras med hänsyn till ev

# 0 Försörjningsbörda

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du ska studera. Uppgifter om kurstid kan du få från den skola där tar ämnen på såväl grundskole- som gymnasienivå

# Heltidsstudier - deltidsstudier studier. Inom kommunal och statlig vuxenutbildminst hälften av studiernas omfattning vid heltidsdier eller deltidsstudier. Deltidsstudier ska omfatta Särskilt vuxenstudiestöd kan utgå för heltidsstu-

ning räknas minst 20 poäng per månad som helpoäng per månad berättigar inte till studiestöd tidsstudier. Studier av mindre omfattning än 10 tidsstudier och 10-19 poäng per månad som del-

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# 0 Belopp

bidrag och lån. Ange här om du vill ha bara bidrag eller både

# studiemedel **Utbildningsbidrag**

utbetalningen av båda stödformerna. stödsnämnden (CSN) har tillstånd att genom samma att kontrolleras i efterhand. Centrala studiestudiemedel inte utgår samtidigt. Kontroll av att utdataregister kontrollera att vuxenstudiestöd och De uppgifter du lämnar om studiemedel kan komsamtidigt görs av försäkringskassan som handhar bildningsbidrag och vuxenstudiestöd inte utgår bearbetning av riksförsäkringsverkets och CSNs

# Sysselsättning före studiernas borjan

nu. Om du är studerande ska du ange den sysselsättning du hade omedelbart innan du övergick till Ange det yrke eller den sysselsättning som du har

# 8 Förvärvsarbete före studietiden

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dens forläggning. Om du förvärvsarbetar nu ska du fylla i alla uppinte svara på frågorna om arbetstid och arbetstidier, men förvärvsarbetade omedelbart dessförgifter. Detsamma gäller om du visserligen inte förligger långt tillbaka i tiden (flera år) behöver du heller gjort det tidigare eller om förvärvsarbetet innan. Om du inte förvärvsarbetar nu och inte förvärvsarbetar nu därför att du redan påbörjat stu-

# 0 utbildning Tidigare grundläggande

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# Övriga upplysningar

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# Bilagor

bildning finns särskilda blanketter som du kan få vuxenutbildning. Gäller ansökan statlig vuxenutbifogas om ansökan gäller studier i kommunal Blankett 150 "Studiesammanställning" ska alltid skolan. på läroanstalten. Närmare information lämnas av

betyg/intyg över eventuella tidigare studier. fall bifoga vare sig blankett 150, 210 eller kopia av studier i gymnasieskolan behöver du inte i något det dock med blankett 150. Om ansökan gäller tidigare bedrivit studier i denna skolform räcker dier i kommunal/statlig vuxenutbildning och om du genomgången utbildning. Om ansökan gäller stuöver dessa studier eller kopia av betyg/intyg over blankett 210 med rektors/föreståndares yttrande annan gymnasial läroanstalt ska du bifoga antingen högskola, kommunal/statlig vuxenutbildning eller Har du tidigare i vuxen ålder studerat vid folk-

och under rubriken "Utländska medborgare" på borgare. Se vidare under punkt 3 "Medborgarskap" Blankett 145 ska bifogas om du är utländsk med-

delsnamnden. skolan, vuxenutbildningsnämnden eller studieme-Blanketterna 145, 150 och 210 kan du få från

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APPENDIX D.

March 18, 1983.

### VANCOUVER CONSULTATION

Mr. Lloyd Axworthy, Minister of Employment and Immigration, Government of Canada, Ottawa.

Dear Mr. Minister:

The formation of the Federal "Skill Development Task Force" has provided a welcome opportunity to comment on further education opportunities for adult Canadians in the labour force. Recently a group of adult educators and others concerned with this subject met in Vancouver. We wish to convey to you the results of our deliberations.

The attached notes represent a synthesis of our discussions.

We suggest that one of the primary purposes of "paid educational leave" is to create more opportunity for those most affected by the vagaries of economic life and with the least resources for responding successfully. Professionals in the business and academic worlds have historically enjoyed the benefits of schemes for further study and self-improvement. We see paid educational leave as an opportunity to extend such benefits—to the rest of the labour force, including those who work at home, are partially employed or unemployed.

Much hope is placed on the technological revolution in which we are now immersed. We are concerned lest technology polarize the labour force between a privileged minority that has the skills and assets to prosper and a large semi-skilled or unskilled work force that is underemployed and underpaid. Recent study in the United States has revealed a burgeoning and low-paid service sector and much more selective and limited growth -in terms of jobs created- in the area of high technology.

In our view paid educational leave offers at present the most promise for improving social and economic mobility in our society. It addresses directly the feared polarization of the labor force. It does so because it can enable workers to acquire new and relevant skills. It does so because it can permit people to broaden their intellectual horizons.

We have deliberately used the term "paid educational leave" rather than that of "skill development leave." The former better reflects our belief that education not only equip people to survive materially, but also to give them the capacity to fully participate in society. It suggests the acquisition of skills for the marketplace, skills for Enquiry and reflection and skills for engagement in the social, cultural and political life of the country.

The emergence in Canada of the paid educational leave idea is especially timely in light of the parallel emergence of new concepts of work and of employment. Job-sharing, the use of appropriate technology, community economic development along cooperative lines and growing appreciation of the legitimacy of volunteer work (as well as of house work!) all reflect the fluid and changing nature of our economy and of working life. We believe these developments hold promise for work experiences that are satisfying and fulfilling. They should be supported in public policies.

We envision a society where work, life style and culture inter-relate and reinforce one another in a creative rhythm. Work and learning together give meaning and purpose to what we do. Paid educational leave can be the integrating vehicle.

In the establishment of paid educational leave policies the methods of educational provision will be as important as the curriculum that is offered. Public education institutions should develop education methods and settings that ensure access for those who are disadvantaged by background or disability. Arrangements should also be made outside the established institutions with unions, voluntary groups and business for the organization and operation of learning activity under the auspices of paid educational leave policies.

We are excited by the prospect of paid educational leave. We ask that you give serious consideration to the points we have raised, and we wish you and the members of your Task Force success in arguing the case for paid educational leave in Canada.

Yours sincerely.

The Renaissance in Learning Group.

### Renaissance in Learning

March 18, 1983.

### SKILL DEVELOPMENT LEAVE (PAID EDUCATIONAL LEAVE): DISCUSSION

- 1. Changing skill requirements should be incorporated into a positive developmental experience for individuals rather than as a welfare scheme for the unemployed.
- 2. Skill development schemes should be responsive to the needs of a diversity of economic, social and environmental needs instead of simply reflecting the priorities of large or high technology corporations.
- 3. Skill training should reflect individual and family, social, economic, cultural and spiritual needs and motivations in addition to externally imposed standards so that the questions of alienation and deprivation can be addressed.
- 4. The concept of work must be broadened to include broader human aspirations a person's culture for instance.
- 5. The government should work to reduce the cyclical nature of the economy so that the quality of work life can be improved.
- 6. "Economic democracy" is one means of integrating efficiency/equity in the work place.
- 7. Skill Development Leave needs to be developed in a manner that supports the improvement of those who have not fared well in our society is the working poor, prisoners, women who are no longer employable and other groups at risk.
- 8. Information technologies need to be explored as a means of integrating family life and work in a non-exploitive fashion.
- 9. SDL must include homemakers, part-time workers etc in order to support part-time study and work-sharing.
- 10. Skill training techniques should not be restricted to institutional processes but should foster individual and group capabilities to direct their own learning.
- 11. The I.L.O. Convention should be ratified in Canada and used as the basis for SDL policy.
- 12. SDL policy should be used as one means of promoting a full-employment policy.
- 13. International exchanges should be given some emphasis in the SDL program.
- 14. A number of alternate funding schemes need to be developed in order to encourage individual and group initiatives.
- 15. Three key problems will affect the prospects for PEL in Canada; lack of an infrastructure for educational provision, underemployment and unemployment.
- 16. There is a problem that the job is not seen as a place of learning.
- 17. Evidence suggests a rapid increase in skilled jobs but an even largerincrease in semi or low skilled positions. For instance in the United State it is estimated that between 1980 and 1990 there will be 160,000 high tech. jobs created and 700,000 jobs as janitors/custodians and 492,000 in fast food preparation. Thus in the U.S. the ten areas of largest job-growth projection, none have high-tech. elements.
- 18. The utilization of existing skills is as important as the creation of new skills.

### EDMONTON CONSULTATION

MAR 2 8 1983

General Outcomes

March 8/83 - CAAE

# A. Skill Development Leave.

- 1. A national statue in the vein of Canada Pension Plan that requires setting aside of a portion of a salary or payment to allow accumulation of leave time (paid) for study. This is a provision of service for all teachers in Australia.
- Develop an "intern" program. Knowledgeable workers train or educate interns. Intern pay schedule paid by either employee, employer and/or government program.
- Develop system of paid leave for workers to upgrade skills e.g.
   6 months every 4 or 5 years.
- 4. Exchange program between workplaces employees at one job trade places with employees at another job (one which incorporates skills the employee needs or wants).
- 5. What about people not in the paid labor force?
- 6. Encourage employer/employee participation in Skill Development Leave by allowing on a payroll deduction basis similarly to RRSP or RHOSP with employer contributions. That employer contribution received portionately higher to savings when it is directed to disadvantaged groups.
- 7. Tuition deduction to family income for all families.
- 8. Take a portion of salary over a period of years, invest some and then give to employee their money when they want to go! The sums of money invested can cover administrative costs plus a little extra for inservice on what to do with your time when you go. Your job will be waiting for you when you return!
- 9. The Federal Government could offer employers concessions in the form of taxes etc. for encouraging employees to take Skill Development Leave.
- 10. Employers would have to be informed of the advantages of Skill Development Leave to their company or volunteer organization.
- 11. Among teachers, current licensing regulations do not encourage (require) skill development. If teachers had to requalify at regular intervals, they would be motivated to consider leave. Among teachers who do

  leave, major problems are with university requirements.

  Many unnecessary provisions apply: residency requirements for degrees, lack of access for rural students, lack of provision for part-time students (U of A bookstore closes at 4:30 pm. daily) are discouraging. For clerical staff, programs should be on-site and cheap, and regular.

- 12. Extension of concept of interchange. Canada concept to exchanges between volunteer organizations and corporations and between various types of volunteer organizations. Funding assistance could be provided by government and foundations. (Idea here is that working in another working environment is educational to same extent as going on educational leave to a university or other institution).
- 13. Training allowances and tuition payments-extended to employed persons.
- 14. Incentive to employers i.e. subsidy and wages while on educational leave.
- 15. Accumulate educational leave similar to sick leave.
- 16. Free tuition and training to the volunteer force.



Room 540, Avord Tower 2002 Victoria Avenue Regina, Saskatchewan S4P 3V7 Phone: 525-0355

# SENIOR CITIZENS' PROVINCIAL COUNCIL

CITIZENS? PROVINCIAL COUNCIL

March 18, 1983

Mr. Ian Morrison, Executive Director Canadian Association for Adult Education Corbett House 29 Prince Arthur Avenue TORONTO, Ontario M5R 1B2

1 AR 40 1983

Dear Ian:

At the recent Saskatoon meeting of the Canadian Association for Adult Education (which was attended by Debra Gillis), to discuss and develop recommendations for Adult Learning in Canada, the issue of Skill Development Leave and the Ministerial Task Force was brought forward. The Senior Citizens' Provincial Council would like to provide a commentary on skill development leave as it pertains to seniors.

The projected growth of the senior citizen population in Canada has implications for a skill development leave policy that addresses not only present needs of the older population, but also those areas affecting the quality of life after retirement from the work force. Such a policy may have an impact in the following areas: Pre-retirement Education, Retirement Income and Professional Development of Service Providers.

# 1. Pre-Retirement Education

The Senior Citizens' Provincial Council has been involved in the field of pre-retirement education for many years and has recommended:

That there is a need to convince individuals of the need for preretirement planning. Society as a whole should be encouraged to recognize that the problems of both aging and retirement are fairly common and that people share fears and concerns prior to this period. Pre-retirement education is a mechanism which provides the methodology to cope with or alleviate these problems, fears, and concerns.

There is a need to demonstrate to "Business" and unions, the need to support the development of pre-retirement education programs, first of all as a moral obligation to employees and members, and second because of the benefits they would accrue.

By ensuring that pre-retirement education is included as a paid educational opportunity, governments and businesses would be recognizing its need and value.

# 2. Retirement Income

At the present time almost 52% of Canadians over the age of 65 relv on the Guaranteed Income Supplement as a major source of income. About one half of these people are receiving a full supplement indicating that they

. . . . 2

have little or no other source of income other than Old Age Security (OAS). Less than 40% of seniors in Canada receive some payment from the Canada Pension Plan. What these figures mean is that a large minority of older people have incomes near or below the poverty line, the most disadvantaged of whom are older, single women.

A skill development policy could affect the future retirement income of seniors, particularly those enrolled in private pension schemes. Such training would allow individuals to become upwardly mobile in their employment thereby increasing retirement incomes and reducing the degree of early retirement. The increase of women in the work force will have a profound effect on the economic status of older women upon retirement. However, these benefits will only be felt if women, who primarily enter the job market at lower paying positions, are given the ability to upgrade skills and compete equally for higher present and therefore future retirement incomes.

# 3. Professional Development of Service Providers

Senior Citizens are among the heaviest consumers of health and social services. The demographic imperative suggests that this utilization trend will continue and expand. However, many individuals working in Special Care Homes, Hospitals, Social Service Agencies, Home Care, etc., are not trained in the field of gerontology. Professional development that places an emphasis on awareness of needs of older adults may act to improve the quality of care in these service fields and enhance the quality of life of seniors.

The skill development policy should address the issue of whether or not there are qualified personnel available and if not, whether adequate funding for training and recruitment can be made available. Such a policy would require co-operation by formal education institutions, such as universities, community colleges and technical institutions in offering appropriate courses in order to fill the need.

I trust this response will be useful to you in your presentation to the Task Force.

Best wishes in future endeavours.

Sincerely yours,

Harry J. Mullens

Harry.

Chairman/Executive Director

HJM/fd

THIS BACKGROUND PAPER IS AVAILABLE FOR

REFERENCE AT CANADIAN RESEARCH LIBRARIES IN BOTH

OFFICIAL LANGUAGES.

THE REPORT OF THE SKILL DEVELOPMENT LEAVE TASK

FORCE, "LEARNING A LIVING IN CANADA", IS

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REPORT, CONTACT:

Public Affairs
Employment and Immigration Commission
140 Promenades du Portage
Hull, Québec
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